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ABSTRACT

This document is a handbook for adult education professionals to follow when beginning or expanding learning programs to meet the needs of stakeholders at a particular workplace. The handbook presents a seven-step model that is based on the findings of several research and demonstration programs. Each of the handbook's seven chapters details one step of the model. Each chapter includes tips, suggested activities, recommended resources, and a variety of forms tailored to adult education programs in workplace settings. The model's steps and selected substeps are as follows: (1) know your program (surveying adult basic education programs, describing your program to employers); (2) know your community (gathering community information; marketing); (3) know your workplace (workplace culture; goal writing; partnership building); (4) know your resources (human resources, materials, instructional methods); (5) know your plan (principles of planning; proposal development); (6) know your progress; and (7) know your results (gathering and analyzing outcomes data). The concluding chapter recaps the seven steps and discusses the following challenges facing workplace adult education programs: (1) integrating adult education into workforce development; (2) teaching work-related basic skills; (3) using the work context for learning; (4) integrating technology into workplace learning; (5) building respectful relationships; and (6) being collaborative and building partnerships. (MN)

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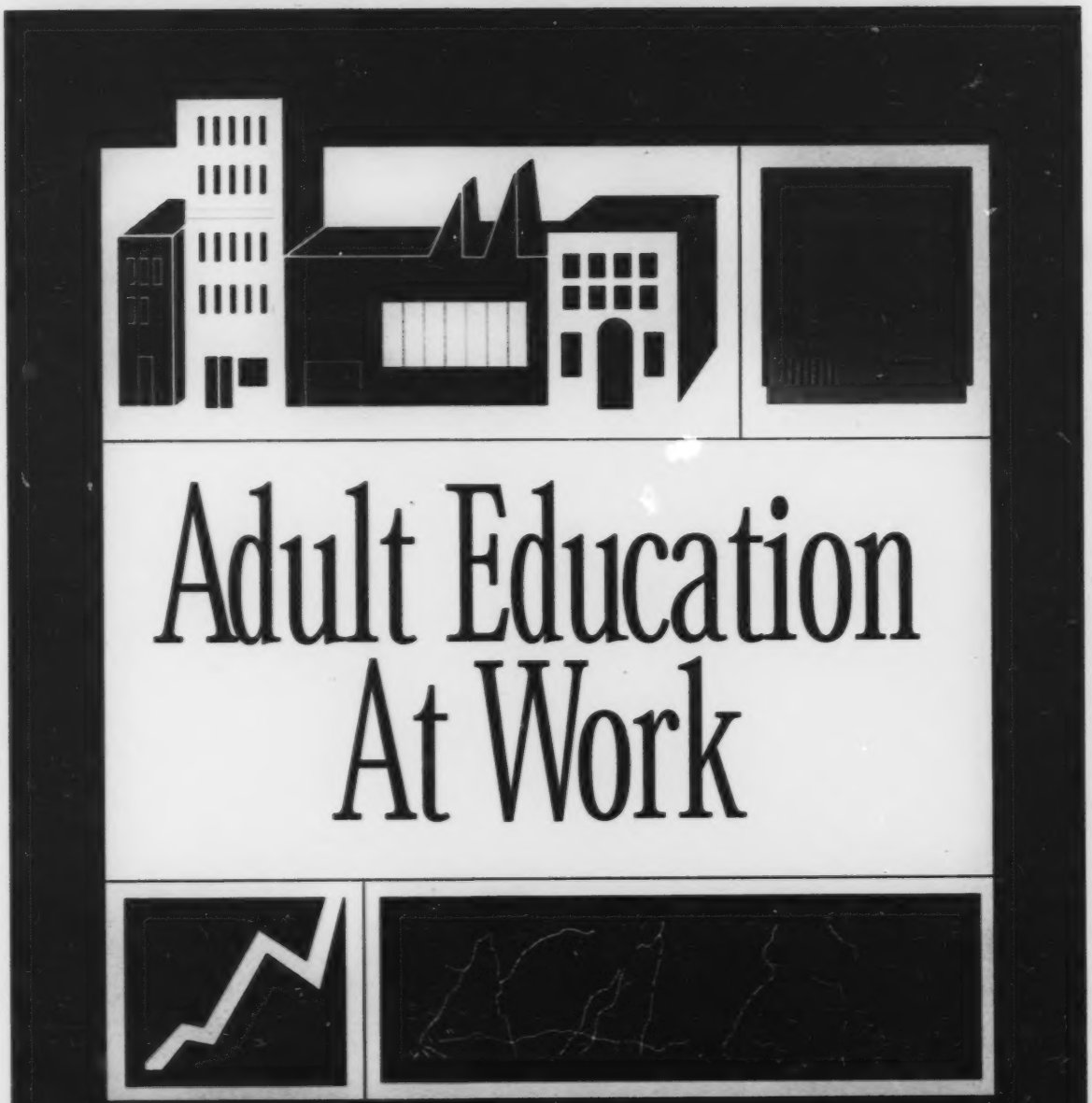

Adult Education At Work

A COLLABORATIVE RESOURCE
ADDRESSING THE CHANGING WORLD
OF WORK AND LEARNING

Dent C. Davis

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Adult Education At Work

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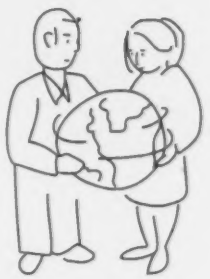
Introduction

This handbook is for Adult Education professionals who want to develop or strengthen their programs in workplace education. Workplace education is the process of offering learning programs designed to meet the needs of stakeholders at a particular workplace. Content in this handbook came from the collective experiences of Tennessee adult education professionals, research, and publications about workplace basic skills. The handbook will evolve as local practitioners use it and contribute what they learn from their experience. Workplace education is not new, but workplaces are changing rapidly. These changes are increasing the demand for basic skills at work. A look at the historical context helps explain the meaning of the growing demand.



An unprecedented interplay of technological, demographic and global economic forces is reshaping the nature of work in America and redefining the American workplace.

(*Workplace Literacy: Reshaping the American Workforce*, U.S. Department of Education, p. 3.)

A. WORKPLACE CHANGES

Changes in Adult Basic Education, the workplace, organizations, and the economy are reshaping the delivery of education and training to working adults. Although it is not the first time that work has changed significantly, today's changes are unique. Looking back at the evolution of work in this country is useful for understanding the present emphasis on basic skills.

Craftpeople

Before 1820, craftspeople populated the workplace: farmers, artisans, millers and merchants. Success depended on a high degree of technical skill and knowledge. Craftspeople took pride in their work and adapted their products to meet local needs. Quality was usually high, and those involved in work knew their craft and market intimately.[1] Craftspeople learned from each other—formally through apprenticeships and informally as they showed each other what to do. Guilds regulated tools, wages, members' hours, quality standards and most importantly, training. Guilds were forerunners of today's unions.

Industrialization

In the early twentieth century, the Industrial Revolution "revolutionized" the way work was done. Industrialization required training for specific tasks. Work was not home-based but took place in factories—large, impersonal organiza-

[1]Carnevale, A. P., Gainer, L. J. & Meltzer, A. S. 1991. *Workplace Basics: The Essential Skills Employers Want.* San Fransico: Jossey Bass.

Introduction

Research results show that in Tennessee:

- **Cultural diversity has increased the need for English for speakers of other languages.**
- **Computerized manufacturing requires higher math skills.**
- **Total Quality requires team skills and statistical literacy.**
- **Emphasis on customer service requires solid interpersonal skills.**
- **Basic clerical jobs require a knowledge of word processing.**

tions. Efficiency reduced the need for craftspeople because they could not compete with the speed of the assembly line. Shops gave way to factories where individual workers were responsible for one step in the process that mass produced standardized goods. In the factory, a front-line worker needed only a few skills. Management made decisions for the worker. Work was repetitive and required as much obedience and endurance as it did skill. During this time, high educational attainment was unnecessary for many assembly line jobs. Today, the use of technology on the job is raising the educational expectations for workers. The technological revolution and the new economy are overshadowing the industrial revolution.

High Performance Workplaces

Many authors today talk about an emerging "new economic order" that is reshaping the way work is done in this country. This economy is shaped by the way goods and services are delivered. Rapid technology changes, the total quality movement, team-based manufacturing, globalization, and new management styles are resulting in the emergence of a new type of workplace. In the new workplace, individuals at all organizational levels must learn continuously to increase both their skills and knowledge. Organizational restructuring has eliminated many middle management positions. Front-line employees are asked to take more initiative, ask questions, solve problems, be flexible, perform a wide variety of jobs, and take more decision-making responsibility. These "basic skills" are very different than those needed in "top-down" traditional assembly line workplaces. The workplace literature describes three characteristics of a the new workplace—innovation, learning and collaboration.

INNOVATION: Rapid innovation is a characteristic of the new economy. Innovation today is often a result of technology, especially information technology. The computer, primarily the microcomputer, is accelerating the rate of innovation in many areas. In accounting, production, sales and marketing, maintaining inventory, scheduling work, and delivering education and training, the computer has assumed an ever larger role in the American workplace. Computerized machines and the new work processes that result also drive innovation. Coupled with a global emphasis, the explosive use of technology on the job is compelling the American workplace to change.

LEARNING: Change requires learning. New work requirements necessitate an ability to adapt quickly. Innovation in today's workplace is causing an unprecedented level of learning. The term "learning organization" and "high-performance workplace" describes the new workplace where learning occurs at all levels of the organization. Workplace learning usually has a purpose and an impact on the work done. Learning in the workplace occurs in a variety of

ways to adapt to the changing needs of each situation. A formal educational class is one approach, however, no single approach to learning is best. Effectiveness is the key. Effectiveness measured against identified needs and desired outcomes, not the use of one approach or methodology.

COLLABORATION: Today's levels of innovation and learning have also led to an increasing emphasis on collaboration. Knowing everything necessary for effective work is no longer possible for one employee, or one manager, or one organization in a rapidly changing world. New workplaces are characterized by a more collaborative, participatory style of management. Many organizations are moving from hierarchy and control to collaboration. Networks of customers, suppliers and producers are commonplace. As workplaces emphasize "high performance," decision making occurs in a more distributed process throughout the organization. This decision making process involves employee work teams and other interdepartmental cooperation.

"Used to, all you had to do is one thing. Now you have to be able to do several jobs, and do them well and be able to show new employees how to do them, and do them right. We are always meeting and when we aren't meeting, we are training. And we still have to work. And we can't afford any mistakes. It's a different world. I'm always trying to learn what to do next . . . "

—Long time supervisor in manufacturing.

Tennessee workplaces are changing at different rates. Some are high performance workplaces committed to continuous learning and improvement. Others view learning as a luxury reserved mostly for top management. Most workplaces fall somewhere between these two extremes.

Change, real change, is never easy. Few people want to innovate, collaborate, or even learn at the pace demanded by today's changing society. Change is rarely comfortable. Even if we can no longer afford to compete, experiences do not always equip us to collaborate. Innovation is always stressful and can lead to changes that may be unintended and seem to threaten jobs, family life and future dreams.

B. BUILDING ON STRENGTHS OF THE ABE PROGRAM

This handbook is designed to build on the strengths of adult educators as they work collaboratively with employers, employees, other educators and unions (where applicable), to develop innovative workplace education programs. Innovation, collaboration and learning are at the heart of high performance organizations. They are also central to the process that created this handbook—a collaborative effort to identify existing strengths, stretch into new areas of practice, and learn from experience.

Many adult educators in Tennessee have embraced innovation, learning and collaboration in their own programs and practices. Their experiences contributed to the development of *Adult Education at Work*. As one adult educator said, "It is a new world. If we don't expand what we do, shrinking resources will threaten our programs." *Adult Education at Work* is a collaborative resource

Introduction

addressing a changing world of work and learning. This resource will continue to evolve as adult education practitioners contribute their innovative efforts, collaborative practices, and learning.

Where ABE Fits

Where does Adult Basic Education (ABE) fit into the fast-paced changes today? ABE can help working adults develop and strengthen their foundational skills for employment, career advancement, and life long learning. Adult educators can help employers understand the skills employees need for different jobs and how the work environment can lead to learning.

Institutions and employees that do not seek flexibility often have it forced on them

(Carnevale, 1996, p. 139).

Adult Basic Education programs in Tennessee deliver workplace education for several reasons. The most common is preparation for the GED. Other reasons include teaching a specific workplace skill or teaching English for speakers of other languages. People participate in adult learning classes for a variety of reasons. For many, the reason is to improve their skills so they can get a better job. Some people want to learn so they can keep the job they have. Others want a GED so they can apply to a community college or a technical school.

Developing the Model in This Handbook

Several research and demonstration projects planted the seeds for this handbook. The first was the Tennessee Workforce Learning Project conducted in 1992. Dent Davis, Project Director, worked collaboratively with Performance Learning Cooperative and seven Adult Education Coordinators to develop the workplace curriculum, *Working Together.* This curriculum, tested in seven workplaces, blended team skills and basic skills in the context of real work. The project showed that the participants, even those mandated to be there, could become highly involved and active learners when the curriculum relates to their work and organizational life.

The second precursor was a year-long research project in 1994 to identify the components of the learning system in a workplace. This research involved seventeen workplaces in middle Tennessee including manufacturing plants, utility companies, schools, health care organizations, and law enforcement agencies. The study resulted in a model for determining how a workplace's environment affects learning.

In 1996, a survey was designed with the help of an advisory group of eight Adult Basic Education Coordinators. It was administered to supervisors of 104 ABE programs funded through the State Department of Education's Division of Adult and Community Education. Seventy-three administrators responded to the survey. The high response rate (considering it was summer) is an indication of the interest in adult education in work settings. Chapter One reports

the survey results in detail. The model in this handbook is a result of these projects, the comments and ideas of adult educators, and the literature on projects conducted across the country.

C. ADULT EDUCATION AT WORK—STEPS TO FOLLOW

Adult Education at Work begins with this introduction, has seven chapters and a conclusion. The introduction examines the changes occurring in the workplace and the historical context for these changes. After the introduction, each chapter focuses on a key practical step necessary for an effective workplace education program.

POINTS TO KEEP IN MIND

This handbook is not finished even though it appears in print. The ideas and suggestions will grow with experiences Tennessee practitioners have in workplace settings.

STEP 1: KNOW YOUR PROGRAM. "Know Your Program" includes clarifying your program's mission, accomplishments, and capacity. It identifies publicity methods and effective financial models. Activities in this step result in a mission statement and fact sheet for publicity.

STEP 2: KNOW YOUR COMMUNITY. "Know Your Community" addresses the adult education program's local community. It focuses on identifying other educational service providers, prospective employers, and local labor market needs. Included in this step is the process of identifying statistical information useful for marketing activities. Activities in this step result in a marketing plan for adult education at work.

STEP 3: KNOW YOUR WORKPLACE. Once a particular workplace is identified, "Know Your Workplace" focuses on understanding the workplace, its culture, employees, and learning needs. This section addresses the process of gathering workplace data necessary for developing a program. Also included is the process of identifying the stakeholders and the ways each can be involved in and benefit from the education program. Adult educators build partnerships with employers and other stakeholders in the workplace. Activities in this step result in written program goals based on identifiable workplace needs.

STEP 4: KNOW YOUR RESOURCES. "Know Your Resources" is the next step. After determining the employer's interest in establishing a program, this step concentrates on finding the available resources necessary to plan and carry out the program. It includes teacher qualifications, materials, assessment and evaluation methods. Activities in this step result in the identification of resources to accomplish the specific program goals.

STEP 5: KNOW YOUR PLAN. "Know Your Plan" includes finalizing the details of the education plan with the employer. Important program details such as program goals, assessment methods, recruitment, meeting time, meet-

Introduction

Throughout the text the following icons are used to indicate a particular kind of material:

☛ TIP

TIPS
Ideas, stories, data or principles for help in understanding adult education at work.

ACTIVITY
Practical exercises and tools for doing an adult education at work program

RESOURCE
Materials or contact persons, or other resources helpful in developing an adult education at work program

FORMS
A variety of forms for use in a workplace setting

ing place are clarified. This section also outlines the various contributions employers can make. These include incentives, collaboration in the educational process, and an advisory group to assure the program is successful in meeting stakeholder needs. Activities in this step result in a formal letter of agreement between the employer and the ABE program that describes the details of the workplace education program.

STEP 6: KNOW YOUR PROGRESS. "Know Your Progress" focuses on program management and the need for ongoing interaction between the teacher, the participants, workplace managers, and ABE Coordinators. Periodic measuring of learning gains and employee satisfaction are also a focus of this step. Activities in this step include periodic reporting mechanisms.

STEP 7: KNOW YOUR RESULTS. "Know Your Results" focuses on determining the results of the workplace program. This section includes the following topics—measuring results against the original goals, impact on the workplace, and employee and employer satisfaction. Also included is a format for the final report to the employers, employees, and lessons learned for ABE. Activities in this step result in final reports and documented outcomes.

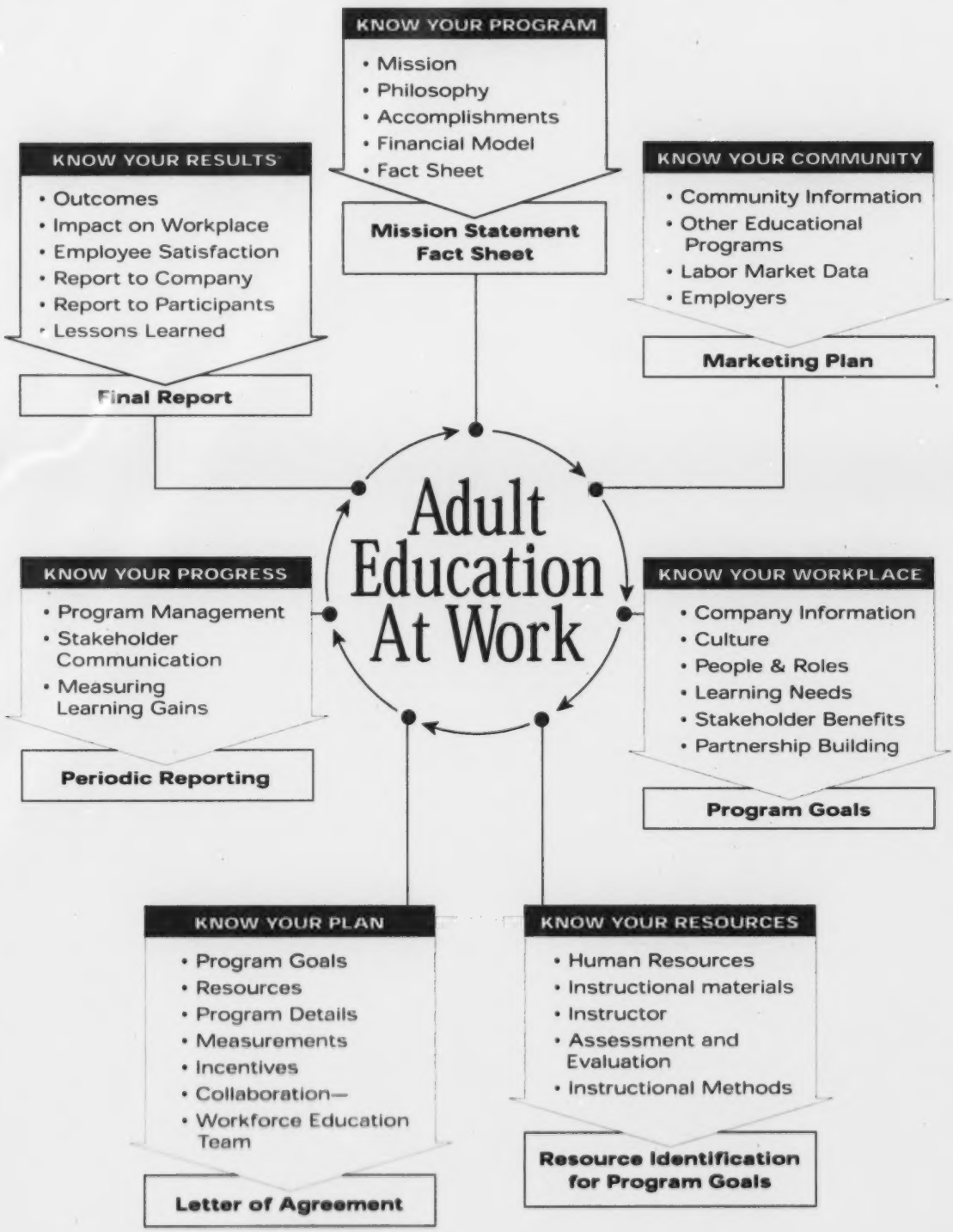
CONCLUSION. The conclusion pulls together the steps of the model. This section also points to other program options, and highlights additional resources.

FORMS AND RESOURCES. Copies of the forms used in the Handbook—useful for duplication. References and resources.

D. HOW TO USE THIS HANDBOOK

Each of the seven steps in this handbook is a chapter. Chapters have four components—***information***, ***activities***, ***resources***, and ***forms***. This handbook is for ABE program administrators regardless of their experience in developing and administering workplace education programs. Some readers will already have looked carefully at their program and will not want to spend much time on the first step. Start where you are.

Adult Education at Work is contextual. It changes depending on the workplace, the time, and the resources available. In this sense, the program outlined in the handbook is never complete. Knowledge about programs in the workplace will always be undergoing revision. What we know is that these seven steps are foundational. They represent critical success factors for adult education at work. What we do not know is exactly what a program will look like in a particular worksite at a particular time.


KNOW YOUR PROGRAM
• Mission
• Philosophy
• Accomplishments
• Financial Model
• Fact Sheet
Mission Statement
Fact Sheet
KNOW YOUR RESULTS
• Outcomes
• Impact on Workplace
• Employee Satisfaction
• Report to Company
• Report to Participants
• Lessons Learned
Final Report
KNOW YOUR COMMUNITY
• Community Information
• Other Educational Programs
• Labor Market Data
• Employers
Marketing Plan
Adult Education At Work
KNOW YOUR PROGRESS
• Program Management
• Stakeholder Communication
• Measuring Learning Gains
Periodic Reporting
KNOW YOUR WORKPLACE
• Company Information
• Culture
• People & Roles
• Learning Needs
• Stakeholder Benefits
• Partnership Building
Program Goals
KNOW YOUR PLAN
• Program Goals
• Resources
• Program Details
• Measurements
• Incentives
• Collaboration—
• Workforce Education Team
Letter of Agreement
KNOW YOUR RESOURCES
• Human Resources
• Instructional materials
• Instructor
• Assessment and Evaluation
• Instructional Methods
Resource Identification for Program Goals

Notes

Step 1: Know Your Program

"Who are you?" said the Caterpillar.... "I hardly know, Sir, just at present," Alice replied rather shyly, "at least I know who I was when I got up this morning, but I think I must have been changed several times since then."

—Lewis Carroll,
Alice's Adventures in Wonderland

Adult Education programs, like Alice, are experiencing rapid change. One key change is the growing connection between adult basic education and the workplace. This section's focus is on ways to determine how your program links to adult education at work. The first part of this section will review results from a survey of Tennessee Adult Basic Education (ABE) programs and their work with employers. The survey results provide a benchmark for the state as a whole. Second is a focus on the mission of your particular program.

STEP 1: KNOW YOUR PROGRAM. "Know Your Program" includes clarifying your program's mission, accomplishments, and capacity. It identifies publicity methods and effective financial models. Activities in this step result in a mission statement and fact sheet for publicity.

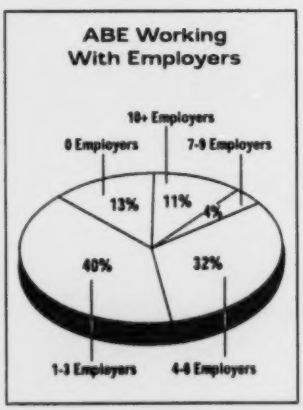
Adult educators...need to take the time to remember the process of developing a quality educational program requires considerable technical skills and a clear vision.

—Jurmo, 1991

A. SURVEY OF ADULT BASIC EDUCATION PROGRAMS

Every Adult Basic Education program in Tennessee is unique, however, they share common themes. Many programs have offered classes at a local worksite. Others have gotten involved in customizing a workplace education program for an employer. This wide range of experience is evident in the results from a survey of adult basic education programs.

In June 1996, a survey was sent to each of the 104 adult education programs that are funded through the State Department of Education's Division of Adult and Community Education. Staff from seventy-three of these programs responded. The high response rate is an indication of the interest that adult educators have in workplace education.



Working With Employers

Adult education programs in the state have a broad range of experience in dealing with employers. In the last five years, 11% of adult education programs

Step 1: Know Your Program

worked with ten or more employers. Over 50% worked with three or fewer employers. Many employers who sponsor adult education programs are classified as small businesses with fewer than 500 employees.

Purpose of Workplace Programs

Respondents to the survey reported that they conducted at least 281 classes or learning events for various employers. More than 7,730 employees participated in these events. At one end of the experience spectrum is a program that has had more than a thousand participants in its workplace learning programs. At the other end is a program that reported five participants.

According to the 1996 survey results, Adult Education at Work in Tennessee is usually a GED class offered to employees at a specific worksite in which teachers use commercially prepared materials.

Programs reported three main reasons for offering education programs in the workplace:

- GED preparation similar to those typically offered by ABE (66%),
- Other types of classes such as English for speakers of other languages, a specific math skill for operating a particular machine, or measurement (19%),
- Customized classes to meet the needs of a specific employer (15%).

About half the adult education programs occurred at a worksite. Employers contacted the local adult basic education professional and "recruited" the program 40% of the time, while an adult basic education professional made the contact 60% of the time. Several programs report that they developed very successful partnerships with employers. Occasionally, programs reported that the employers in their county are not interested in workplace education.

How does your program compare with the results of the survey?

In addition to information about the types of programs offered in the workplace, the survey describes the elements of a successful program and the barriers that often block success. These will be discussed in other sections of the Handbook.

Types of Programs

The survey results correspond with articles that have been written about workplace education programs. There are mainly three types of approaches to workplace education—the GED (General Educational Development) approach, the functional context approach, and the integrated approach.

The GED/ABE Approach. The first type of program is a traditional GED/ABE approach. This includes preparation for a high school equivalency test using commercially prepared materials. Effectiveness is measured by the number of people who get a GED. Specific skills are also taught in this approach. For example, a group of workers may need a refresher course in math to help them with statistical process control. Advocates of this approach say that par-

Step 1: Know Your Program

ticipants benefit because they learn or refresh their academics skills. In addition, the GED is the "gateway" to all post-secondary educational activities. Receiving a GED builds confidence and self-esteem according to a number of survey respondents.

Most of the programs in Tennessee follow the GED/ABE approach.

The Functional Context Approach. In a functional context approach, the content of the learning program is tailored to a an individual worker or group of workers doing a specific job. Lessons simulate real work events and participants use work related materials to build their basic skills in reading, math, and writing. Practitioners analyze the literacy tasks of the job in order to determine the basic skill requirements. Assessment is done by identifying an individual's deficiency in relation to literacy requirements of the job. The learning program is designed to eliminate the person's deficiency and fill the gap between the job requirements and the person's skills. Various kinds of measures are used to determine if the learning goal was achieved. Advocates of this approach say that participants learn the skills needed to effectively perform their jobs.

The GED is the "gateway" to all post-secondary educational activities.

The survey results show that there are very few ABE programs using the functional context approach.

The Integrated Approach. The integrated approach focuses on the organizational system, the aspirations of the individual, and the requirements of their current and future jobs. This approach links the employee's strengths with the organization's needs and goals. Organizations that are committed to continuous improvement often use this approach in assessing basic skill needs. This approach may also analyze literacy tasks to determine basic skills needed for a particular job, however, the analysis will be done in the context of the entire workplace and not just one particular job.

These three approaches or a combination of them are used in most workplace education programs. You may find it helpful to compare your program with the results of the survey and with the types of programs that are written about in the literature. Do you want to expand your program into more workplaces? Being clear about a program's mission is very helpful before talking with employers.

B. DESCRIBING YOUR PROGRAM TO EMPLOYERS

When talking with employers, adult educators describe their program and explain why their services might be of interest. Clearly written materials will help. These materials can be mailed or left with the employer after a visit. Some programs reported having an information packet in an attractive folder

Step 1: Know Your Program

as a way to introduce their program to employers.

Before introducing the adult education program to an employer, the educator will want to know the following information:

- Program mission
- Philosophy of adult learning
- Program's financial model
- Resources

These items will become part of a "fact sheet" with essential information about a program. Several survey respondents reported that it was helpful to have a "business" look to materials rather than a "school" look.

Program Mission

Most programs have a mission. It is common for the people in a program to assume they know the mission. The mission describes the program's purpose. It answers the question, "What is our reason for being?" Missions often have a noble aspect. It is the noble mission that inspires and anchors the program during periods of intense change. Most programs find it beneficial to write down their mission in a brief statement. Actions that are backed by a sense of mission are often more effective and more satisfying.

SLOGAN EXAMPLES

Tennessee—Sounds Good To Me.

Adult Education—An Investment in Tennessee's Future.

These questions will help you write your mission statement.

—In general, what social needs or workplace needs does your program address?
—How does your program respond to these needs now?
—How will you respond in the future?
—What values are important to your program as you meet these needs?
—What are the long term benefits people can expect from participating in your program?

Each person involved in a program probably has ideas about the program's mission. When writing a mission for the first time, it is helpful for the mission be shared by all the key stakeholders in the program. Stakeholders are people for whom something is very important. These include teachers, participants, and other community members. Write down your mission for your stakeholders. In addition to a written mission, some programs have slogans. For example, the Governor of Tennessee recently announced that our state will have a slogan, "Tennessee, sounds good to me." Roger Hansard and Sherrie Claiborne in Claiborne County distributed publicity information to ABE programs in September 1996. Those materials have a slogan for adult education programs, "Adult Education—An Investment in Tennessee."

W O R K S H E E T

Step 1: Know Your Program

Defining Your Program's Mission

ACTIVITY

A program's mission is best described by the people who are involved in the program—supervisors, teachers, and students. The following activity can be done with any number of people.

Step 1. Plan a meeting to work on your program's mission statement. Reproduce a copy of the "Mission Statement Questions" for each participant.

Step 2. Introduce the purpose of the meeting. Ask each person to write an answer to the questions.

Step 3. Prepare a sheet of newsprint with each question at the top. Post them on walls around the room.

Step 4. After each participant has completed their answers, invite them to report their answers to the group. Write answers on the newsprint. Try to consolidate similar answers so there is little repetition. The answers to each question will be clustered together.

Step 5. Ask the group to identify key words or phrases that speak to them by underlining with colored markers.

Step 6. List the words or phrases that were marked on a separate sheet of newsprint.

Step 7. Ask a small group of three or four participants to take the words and phrases and write a draft of the mission.

Step 8. All participants review the draft and give feedback to the small group.

Step 9. Small group revises statement.

Step 10. Group decides to adopt and support mission statement.

MISSION EXAMPLES

The mission of Adult Education is to provide opportunities for the Sunshine County citizens to become lifelong learners, achieve economic security, and find a greater sense of self-worth and accomplishment through participation in outstanding adult education programs.

The mission of the Pleasant County Adult Education Program is to develop Tennessee's workforce for the twenty-first century by partnering with employers to develop effective workforce education programs.

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People in our workplace programs are working adults. So are we. We treat them as peers.

—Heather Nicely
Kingsport

Philosophy of Adult Learning

Once the mission is completed, it is time to review the philosophy that underlies it. Beliefs about adult learners influence a program's mission. There are many views of adult learners, however, two views are most common in adult education programs. The first view is the "deficit" view. In this view, adult learners are deficient in certain academic skills because they did not learn them when they were in school. The purpose of the ABE program is to identify the deficiencies and help the person eliminate them. Learning is a skill building process measured by standardized achievement tests. The teacher is the one with the knowledge and her job is to teach this knowledge to her students. This is a typical, pedagogical model used in most elementary and high schools. In adult education literature, this is called the "deficit" model.

GED teachers often say that their students are completely focused on their deficits. They are intent on filling their knowledge gaps so they can pass the GED. Sometimes, the participants' needs influence the philosophy of the program.

A second view is the "collaborative" view. In this view, teacher and learner are collaborators in the learning process. Adults are viewed as peers with important comments to make and valuable ideas to contribute. Learning is an inquiry process used to help people access the information they need and formulate and express their opinions. Content is relevant, meaningful and connected to the learner's world. The teacher is not seen as the only person with the answers. This is a typical adult learning model.

If you place the "deficit" view at one end of a continuum and the "collaborative" view at the other, most programs fall somewhere on the continuum. Programs usually have a philosophy of adult learning. However, it may be implicit rather than explicit, and teachers and program staff may understand it in very different ways. Like uncovering your mission, it is useful to uncover your philosophy of adult learning. Once uncovered, you can see whether you like it or you would like to change it.

ACTIVITY

Mission Statement Questions

We are reviewing our program's mission (our purpose or reason for being) and would like your input. Please write your answers to the questions below.

FORM

Mission Statement Questions

— In general, what social needs does our program address?

— How does our program respond to these needs now? In the future?

— What are our program's greatest strengths?

— What are our program's greatest weaknesses?

— What will our program be like in one year? In five years?

— What are the long term benefits people can expect from participating in our program?

— What would we like adults who have participated in our program to say about us?

Using the underlined words as a guide to what is important, write a draft of your mission here.

Step 1: Know Your Program

ACTIVITY

Locate yourself on this continuum of adult learning.

1	2	3	4	5	6	7
Deficit Model						Collaborative Model
Teacher teaches						Teacher and learner
Learner learns						Learn and teach together

Ask staff and teachers to locate themselves on the continuum. Figure the averages for all staff who answered the question. Look at the composite. Does this accurately represent the position of your adult education program philosophically?

Program's Financial Model

How much does a program cost? Many ABE Coordinators who responded to the survey described their programs as free of charge. Others said their program costs include teacher salary, benefits, and materials. Employers may not value a program that is "free." Many ABE programs are funded by tax dollars. The state and local school systems provide support for these programs. A program may offer its services "free" to adult learners, however, program administrators usually know what their program actually costs.

Every adult education program has a financial model. The heart of a financial model is a financial statement reflecting the costs and revenues for your program and its services. Included are **costs** for:

- Instructor compensation (including instruction, assessment and evaluation of program)
- Books and materials costs per student
- Number of students needed for cost effectiveness
- Overhead costs such as program administration, rent, utilities, telephone, computer costs, copying, and secretarial support.

These costs are offset by **revenues**. These could include:

- Participant fees
- Company contribution of space, copying, secretarial support, storage and equipment
- Company financial support of employee participation, such as incentives.
- Public sector tax revenues
- Project grants

Adult Education costs and revenues are shown on a Financial Statement. All services have costs and revenues.

Variable Costs: Some costs will *vary* according to the number of programs or participants, such as printing of specific program materials.

Fixed Costs: Other costs will be *fixed* no matter how many programs you conduct, such as rent, salaries, etc.

Other costs may be variable and not easily allocated to a specific program, such as monthly Internet service, office supplies, etc. All costs need to be considered when pricing a program, product or service. As a part of "Know Your Program," examine a financial statement and determine what the costs per participant for specific learning programs.

Program Administrators have to decide what to say about cost/revenue in the information packet. If a program is free, it may constrain the types of services that can be offered. Program managers have more flexibility if they do not say their program is free. Costs for a particular worksite learning program will be discussed further in "Step 2 - Know Your Community."

☛ TIP

Make an inventory of the resources of your program:

1. People

2. Equipment

3. Facilities

4. Materials and supplies

Resources

Adult education programs in Tennessee have diverse resources:

- Relationships with local schools
- Networking with community leaders
- Knowledge about how adults learn
- Experience working with adults
- Qualified teachers
- Volunteers
- Assessment methods
- Program materials
- Computer labs
- Files of creative teaching ideas

Identifying the specific resources of a program can be very useful in planning and marketing services. Particular resources for the workplace will be reviewed in "Step 6: Know Your Resources."

Step 1: Know Your Program

C. PROGRAM FACT SHEET

In addition to a mission, "slogan," costs, and resources, employers will want to know a program's track record. They will be interested in specifics. A fact sheet gives a summary of a program's accomplishments at a glance. A fact sheet actually consists of the "facts" about a program. Items from the fact sheet can be used to prepare a brochure or insert into a letter to an employer.

Employers will be interested in information that answers the following kinds of questions.

—How long has your program been operating?

—Who do you offer services to?

—What services do you offer? (Describe these in detail).

—What is your program known for?

—How many employers have you worked with?

—What results have you achieved?

—How many adults have you served?

—How many adults got a GED last year as a result of your program?

—What are your programs' strengths?

—How much does a workplace program cost?

—How long does a workplace program last?

—How can someone get in touch with you?

Some programs ask the adults who have left the program to write a paragraph about how they benefitted from being in the program. Their comments can be very compelling. Employers may be willing for you to use their name on your materials. (You need written permission to do this.)

ACTIVITY

Identifying Information for an Adult Education Fact Sheet

Step 1: Know Your Program

FORM

Adult Education Fact Sheet

—The name of our program is...

— We have operated for...

— The adults we serve are...

— We offer the following services...

— The key strengths of our teachers and staff are...

—Our program is known for...

— We have worked with the following employers...

— In our community, we have served more than...

— In the last five years, _____ adults got a GED in _____County.

— We have achieved the following results...

—We hold classes in the following types of sites...

— The name of a contact person, our address and telephone number is...

Step 1: Know Your Program

Charlotte Boley in McNairy County tested some of the activities in the Handbook. She followed the suggestions in "Know Your Program" and created a fact sheet for her program.

McNairy County Adult and Community Education Center

- **In McNairy County over 6,000 people do not have a High School diploma.**
- **In McNairy County 426 employers employ 10,000 people and there is a 7.9% unemployment rate.**
- **Research shows a high school or GED diploma is an indicator of long time success in a job.**

The McNairy County Adult and Community Education program provides learning opportunities to all citizens. These include:

- Literacy classes
- Basic skill training
- GED classes
- ESOL (English as a second other language) class
- Community interest classes (Beginning Spanish, art, computer and Internet)

We also offer Adult Education for specific basic skills training on site or at our center for employers. These programs can be customized to meet the needs of the employers.

An important strength of our program is our concern for our participants. We work hard to accommodate individual differences and address particular needs of the student. Our goal at the McNairy County Adult Learning Center is to make McNairy County a better place for all citizens.

McNairy County Adult Learning Center has been serving citizens since 1987. In 1996, we enrolled over 500 adults and helped 71 receive a GED diploma. The first six months of 1997, we have had 70 complete the requirements for a GED diploma.

Step 1: Know Your Program

Information Packet

The Fact Sheet gives the facts about a program. However, the facts do not always tell the whole story. Some programs prepare an Information Packet. This packet can contain a variety of types of information about your program.

- A letter of introducing yourself and your program
- Copies of articles that have appeared in newspapers or other publications
- Cost of your services
- Photographs of students engaged in learning activities
- Testimonials from companies and employees where you have had a successful program
- Testimonials from participants that have met their goals because of your program

The information packet should educate an employer about workplace basic skills. When the information packet is complete, it is an effective tool for introducing your program to employers.

In addition to the "facts" about a program, usually include some statistical facts about literacy levels of Tennesseans, or information about the number of adults who do not have a high school diploma.

Most important is information that would be interesting to employers. Chapter Two will gives ideas about how to use facts to show the local need that a program addresses and to build a marketing plan.

FACTS:

•8984 (24%) adults, age 25 and older have less than a ninth grade education in Greene County.

• The 1995 Greenville Adult Basic Education Program served 805 participants.

• 83 adults received their GED certificates during 1994/95.

Tutors donated 1,483 hours of instructional time in 1994/95.

—Kim Gass
Greenville

Notes

Step 2: Know Your Community

Introduction

Knowing your local community is as important as knowing your program. No Adult Basic Education program exists in a vacuum. Many individuals, groups and organizations affect a program's success. Understanding the local community and its resources plays an important role in marketing and program planning.

Many educators are uncomfortable thinking about marketing their program. However, marketing is the way to inform others about Adult Basic Education and what it has to offer the community. Marketing efforts raise awareness of the importance of lifelong learning in today's changing world.

The statewide survey of adult basic education programs in Tennessee shows that adult education professionals initiate 60% of workplace programs. A marketing plan helps staff pick workplaces that best suit their program's mission and goals. A plan for marketing adult education services can increase success and reduce failure.

This step will result in a marketing plan for delivering workplace education services. This chapter focuses on two tasks. First is gathering information about your community and second is developing a written marketing plan for adult education at work.

A. COMMUNITY INFORMATION

Adult education professionals in Tennessee know a lot about their communities. Good community information is an important factor in planning adult education programs at work. Three areas of information are important for adult education marketing efforts.

1. Information about your local community.	*According to the data, what kinds of programs does your community need?*
2. Information about local employers and labor unions and their needs for adult education and training.	*How does your mission fit in a workplace setting?*
3. Information about other local education programs for adults.	*How is your program different from others?*

Step 2: Know Your Community

Local community information is useful for identifying the needs in a community and the unique way an adult basic education program helps to meet those needs.

Creating a Community Profile

Adult educators need information about scale trends that are affecting their programs right now and in the future. Different agencies in Tennessee collect community information that is very useful for understanding the needs of local communities.

Completing a community profile will show how a program's mission fits into the larger context of a community. Information can be found in a variety of

ACTIVITY

Create a Community Profile

The first step is to create a profile of your community that answers the following questions:

About Your Community

—Where is your community located?
—Is it considered urban or rural?
—What is the population?
—What is the gender, racial, ethnic, and age make-up of the population?
—What are the per capita income levels in your community?
—How many people receive public assistance?

Education in Your Community

—What percent of the population is in school?
—What percentage of youth finish high school?
—How many graduating high school seniors go on to post-secondary education?
—What percentage of the adults dropped out of school before completing 8th grade?
—What percentage of adults drop out of high school?
—What percent of the population is non English speaking?
—What types of continuing education and training opportunities are available locally and what are the entrance requirements?

Local Workforce and Employment Trends

—What percentage of people are currently unemployed?
—What percentage of the adult population have never entered the workforce?
—What are the main industries (manufacturing, health care, etc.?)
—Who are the largest employers?
—What percentage of employers have fewer than 500 (100) employees?
—What industries are growing? Declining?
—What areas of the workforce are at risk locally? Why?

Local Services

—What types of services are available for economically disadvantaged people?
—What kinds of career services are available for job seekers?
—What agencies or private sector groups are recruiting new industries or developing new jobs? In what industries?

Step 2: Know Your Community

sources. Sources for research and reports include the Tennessee Departments of Economic and Community Development and the Tennessee Department of Employment Security. Labor unions are an important source of information. Another information source is the Tennessee Economic Development Center. BellSouth and TVA have done surveys in many communities and have significant data that might be useful. The Chambers of Commerce, Industrial Development Board or Regional Development District office are good contacts and also the local power supplier. The Tennessee Department of Education, Office of Adult and Community Education is an important resource for information about educational attainment.

Many of these agencies and organizations write reports that can be found in your local library. In addition, the library has census data and resources such as the *Tennessee Abstract* (B. Vickers, ed., Center for Business and Economic Research, The University of Tennessee, Knoxville, 1994). Building a knowledge base about the community conveys to employers that the ABE program is serious about providing services that make a difference and address the areas of greatest need.

Statistics never tell the whole story. Students enrolled in adult education classes are a valuable source of information about the labor market system and the barriers economically disadvantaged people face as they look for employment. Their stories often give life to the numbers.

The time taken to gather relevant information will advance a program's goals. A marketing plan will reflect the real needs in a community. Completing the community profile will add to the understanding of the type of workplace information necessary to collect. The next chapter describes ways to know your workplace.

Local Employers and Labor Unions

Local employers and labor organizations represent the opportunities for developing programs in workplace settings. To decide what type of workplace program to offer, "research" a community to identify the local employers. Most ABE Supervisors in Tennessee develop this information "informally" through conversations at local meetings. Writing the information will strengthen those efforts and expand the information base about local employers.

Understanding local businesses in the community and their education and training needs will help match the resources of the ABE program with the needs in a local community.

Step 2: Know Your Community

☛ TIP

"Be persistent! Use the Chamber of Commerce and talk to company executives."
Steve Heath,
Athens-Etowah City

ACTIVITY

Where can you find the names and locations of local employers?

— Contact employers with whom you have already worked.
— Ask the students presently in ABE programs where they work and if their employer might be interested in an on-site program.
— Contact the local Chamber of Commerce for a list of members.
— Check to see if your community has a Workforce Development Board.
— Contact the Industrial Development Board.
— An Educational Alliance lists employers participating in local cooperative educational endeavors. These groups work to share educational resources and opportunities.
— Department of Employment Security compiles labor market reports.

Adult educators in Tennessee identify employers in a variety of ways. The following are several effective strategies for identifying employers:

Chamber of Commerce. If you have not spoken to the local Chamber of Commerce, it is a good place to start learning about local employers.

Civic Club Presentations. Offer to make presentations for service clubs like Rotary and Kiwanis. (Your fact sheet will be a good handout for this audience.)

Open Houses. Invite employers to an open house at an ABE site.

Labor Unions. Contact labor union representatives for information about training needs of their members.

Champions. Cultivate a relationship with an influential person who believes in what you are offering and who knows local employers. These individuals can be instrumental in helping you identify local employers who might be receptive to your programs.

ACTIVITY

Set up a meeting with a community leader:

— Call the President or Executive Director.
— Introduce yourself and your program.
— Make an appointment.
— LISTEN to what the leader thinks is important.
— Use an Interview Guide
— Take notes.
— Send a follow-up note thanking the individual for the meeting.

FORM

Interview Questions for Local Community Leaders:

1. What types of businesses are growing in our community?

2. What business types are declining?

3. Which businesses have basic skills programs?

4. Do you know of any businesses that need assistance in this area?

5. What do the employees in this community need to learn today to maintain or advance their careers?

6. Where in the community might an employee go to increase their skills?

☛ TIP

When talking to employers, "be knowledgeable about statistical process/quality control philosophies, Edward Deming, team concepts, and Stephen Covey."

Susan Westberry, Maury County

Step 2: Know Your Community

The following form compiles information about area employers.

FORM

Key Local Employers

Business	Contact person	Address	Phone Number	Product	Number of Employees

Using Surveys

Effective way to gather information about employers is to send them a survey. Surveys are especially useful in larger communities, where there are large numbers of employers. Surveys take time to develop, administer and interpret. They can also be expensive depending on the number of surveys you plan to send. So thoughtful planning is important. ABE programs with their limited staffs can successfully use volunteers to help administer and analyze survey information. Write a letter introducing yourself and explaining the purpose of the survey.

The following is an example of an employer survey.

Gather Information about Area Employers

FORM

Employer Survey

Tennessee Department of Education
Division of Adult and Community Education

Adult Education at Work – Basic Skills Needs

Your local adult education office is conducting this survey to determine the need for workplace basic skills programs. Please take a moment to fill out the survey and return it in the enclosed envelope. Community-wide survey results will be compiled in a report. Please check the box if you would like to receive a copy of the report.

☐ Yes, I would like a copy of the report.

Business Name: _____

Product(s): _____

Number of Employees: _____

Number of shifts: _____

Contact person: _____

Address: _____

Phone Number: _____

Fax Number: _____

E Mail: _____

(continued)

Step 2: Know Your Community

Does your company require a high school diploma or a GED for employment? ☐ Yes ☐ No

If not, do you plan to require a high school diploma or a GED in the future? ☐ Yes ☐ No

Does your company have a Training Department? ☐ Yes ☐ No

Does your company have a staff member who focuses on training and education? ☐ Yes ☐ No

How important is training and education for the future of your organization? *(Circle one)*

1 (not important) **2** **3** (somewhat important) **4** **5** (very important)

How receptive are employees in your organization to participation in education programs?

1 (not receptive) **2** **3** (somewhat receptive) **4** **5** (very receptive)

To what degree are learning programs focusing on basic skills needed in your organization?

1 (not needed) **2** **3** (somewhat needed) **4** **5** (very needed)

Does your company have a room dedicated to training needs? ☐ Yes ☐ No

Does your company have one or more computers that you use for training programs? ☐ Yes ☐ No

Indicate the kinds of learning programs that you have had at your workplace with a check (✓).

a. ____ Classes with instructor
b. ____ VCR taped courses
c. ____ Seminars or workshops
d. ____ A course on computer
e. ____ A resource center
f. ____ Reading manuals and books
g. ____ Coaching from supervisor
h. ____ Coaching from manager
i. ____ Help from fellow workers
j. ____ Trial and error the employee

Step 2: Know Your Community

If you were going to offer a learning program focusing on adult basic skills at your worksite, what specific skills training would be most useful for your organization? Check (✓) all that would apply.

___ GED program

___ Reading work related text

___ Writing memos, letters and reports

___ Basic computer skills

___ Managing conflicts

___ Problem solving and decision making

___ Basic math skills (tape measures)

___ Basic math skills (fractions)

___ Basic math skills (percent)

___ Basic math skills (ratio and proportions)

___ Basic math skills (use of calculators)

___ Basic math skills (metric conversions)

___ Team skills

___ Listening skills

___ Reading for understanding

___ Time management

___English for speakers of other languages

___ Other: _____

Please share any additional comments or questions:

Would you like someone from your local adult education program to contact you about the possibility of offering a basic skills learning program at your workplace? ☐ Yes ☐ No

Step 2: Know Your Community

RESOURCE

Administering, Analyzing and Interpreting Surveys

There are many methods for administering and interpreting survey instruments. The following has been consolidated from a number of efforts. It should be adapted to meet particular needs.

1. Identify staff and/or volunteers to manage survey process.

☛ TIP

Get to know the people at the Chamber. They have lots of information that is helpful to us.

Charlotte Boley
McNairy County

2. Develop a list of those to be surveyed. Use criteria such as likelihood to want education program, interest in basic skills, prior experience with employer, type, size, location, of company, etc. List should include company/contact person/addresses/phone number.

3. Introductory letter prepared with self-addressed return envelopes. Some people believe it is helpful to put stamps on the return envelope, but this depends on your budget.

4. Create a database of employers to be surveyed (company/contact person, addresses, phone number, date mailed/date returned).

5. Mail survey.

6. As surveys are returned log in return on database of employers surveyed and send a letter of thanks. As surveys are returned, maintain appropriate confidentiality.

7. Follow up by telephone with employers who have not returned surveys.

8. Tally the surveys by recording raw scores for each question. Figure percentages for specific questions. For example, "Of the 42 surveys returned, 67% of the employers indicated that they would be receptive to a proposal for a basic skills program at their worksite."

9. Summarize the data in a short, one-page report highlighting the information which would be useful for your own marketing and program planning. Often this report will be useful in making presentations to employers, civic clubs, developing grant proposals and completing program evaluations.

10. Maintain a file containing the completed surveys, data analysis, reports and summaries and other information on the survey. This will be especially helpful as you complete more than one survey or data gathering process.

As you compile survey data, it may be useful to use a computer to record data. This can be done using a data base such as Microsoft Access or a spreadsheet such as Microsoft Excel. Recording data on a computer can be time consuming, but may be very worthwhile depending on the size of the survey and its purpose. This is also quite useful if you anticipate using the data on an ongoing basis.

Now that you have a profile of the community and knowledge about local employers, the last step before writing your marketing plan is to look at the other programs in the community that provide basic skills instruction or GED preparation.

Other Adult Education and Training Programs

In most communities, basic skills instruction is offered by a variety of programs. The goals and methods of these programs might be quite different from what would be offered through the Division of Adult and Community Education. In most counties, there is more than one provider of basic skills. Staff in these programs often know one another and some ABE programs have even developed local collaborative partnerships. Learning about the components and constituencies of other basic skills programs helps ABE programs maintain their own unique identity in their marketing efforts.

☛ **TIP**

Partnering with other organizations can increase program results and conserve resources.

Each community has a range of basic skills providers and referring agencies. Basic skills classes are often offered at local community colleges and technology centers as a prerequisite for admission. Basic skills training may also be offered by labor unions, volunteer organizations and community-based organizations. There are workplaces who offer basic skills training through their human resource department. Some communities also participate in Educational Alliances involving businesses and multiple educational service providers. The Tennessee Department of Human Services refers customers for basic skills training.

As you find information on other educational programs, the following forms may be useful in compiling and organizing this data.

Step 2: Know Your Community

Sample Report or the Employer Survey

The following is a report of the Adult Education at Work Employer Survey data for McNairy County. Charlotte Boley and her staff worked with the Chamber of Commerce to identify area employers to be surveyed, administered the survey and did the follow up.

The following is a sample of the EXCEL Worksheet used to tabulate the survey data for this report. This chart corresponds to the questions found on page 5 of the McNairy County Report. In column 3 a "yes" answer is scored with a 1; a "no" with a 0. Each column is added and a percentage of that total computed. Of the 21 respondents, four have a training department (4 ÷ 21= .190476 or 19%).

One of the findings of the survey is that 29% of the respondents (last survey question) wanted to talk about the possibility of offering an adult education program at their workplace.

3	4	5	6
Training dept?	Staff for educ & training	Importance of educ & training	Employees receptive to educ & training progs?
0	1	5	3
0	1	5	3
0	0	0	0
1	1	5	3
0	1	4	5
0	0	4	2
1	1	5	5
1	1	5	3
0	0	5	3
0	1	5	3
0	0	1	1
0	1	3	1
0	0	1	1
0	0	3	2
0	0	2	2
0	0	0	1
0	0	3	2
0	0	3	3
0	0	4	3
1	1	5	3
0	0	4	3
4	9	72	52
0.19047619	0.4285714	3.428571429	2.476190476

This report could be used as a "template" in other counties. Many of the categories will be similar although the numbers and interpretation will differ at least somewhat.

TENNESSEE DEPARTMENT OF EDUCATION
ADULT AND COMMUNITY EDUCATION DIVISION

Adult Education at Work
Employer Survey Report

McNairy County, Tennessee

August 27, 1997

For information or questions contact:
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I. Introduction

This report represents a summary and description of the results of the *Adult Education at Work—Employer Survey* administered to a cross section of 50 employers of McNairy County, Tennessee during May, 1997. A total of 21 or 42% were returned. The survey was administered by the staff of the McNairy County Adult and Community Education Center.

The purpose of the *Adult Education at Work—Employer Survey* is to provide information from a cross section of community employers concerning adult learning needs. This information will assist those involved in Adult Education programs in planning more effective learning experiences.

The data was gathered using the *Adult Education at Work—Employer Survey*, an instrument developed by Dent Davis with the support of the Tennessee Department of Education Division of Adult and Community Education. The survey consists of 11 questions and one written response, and requires approximately 5-10 minutes to complete.

II. Sample

The Survey results have been compared with the latest available McNairy County data from the *Tennessee Statistical Abstract*[1] in four areas:

Data Item	Employer Survey Sample	McNairy County Data, 1993
Number of employees	2379	7380
Number of employers	21	426
Percent of manufacturing organizations	100.00%	46.00%

This comparison shows that this Survey sample differs from the general population in that manufacturing organizations are over-represented. The sample population includes approximately 5% of the area employers who employ approximately 32% of the citizens employed in McNairy County.

[1] Data from Tennessee Statistical Abstract (1994), B. Vickers, ed., Center for Business and Economic Research, College of Business Administration, The University of Tennessee, Knoxville. Figures have been rounded off for comparison purposes and should not be taken to be exact.

III. Findings

Organizations Represented

Over 50 employers were surveyed, with 21 responding (42%). The twenty one sites represented in this study consist of a broad spectrum of manufacturers in McNairy County, ranging in size from 3 to 950 employees. Organizations in this sample average 113 employees. The median company size is 41, indicating that most are smaller employers. Eighty six percent of these organizations have two or more shifts. Companies represented in this sample manufacture wood products, garments, mechanical parts and household items.

Types of Learning Programs

Most of the training that is taking place in these companies is on the job training and is informal in nature. Safety training and new employee orientation account for many of the training experiences conducted using VCR taped courses and instructor led classes. Informal coaching is the dominant mode of learning.

Physical Resources

Training activities at the sites in this study are conducted on the job for the most part. One third of the sites have a training room (29%). Thirty eight percent have one or more computers used in training programs. Almost half of the organizations have a staff member who focuses on the training and education needs of the company (42%).

Importance of Training

Training and education are seen as being moderately important for the companies in this sample. Companies were asked to rate the importance of training and education on a scale of 1 to 5, with one being not important and five being very important. The composite rating for this sample is 3.4 indicating that training and education are moderately important.

Employee Receptiveness to Training

When asked about the receptiveness of employees to training and education programs, the response was less positive. When rating the importance of employee receptiveness on a scale of 1 to 5, with one being not receptive and five being very receptive, the composite rating for this sample is 2.4 indicating that employees are less than enthusiastic about training programs.

Basic Skills Needs

Companies were asked to rate the need for learning programs focusing on basic skills in their organizations on a scale of 1 to 5, with one being not important and five being very important. The composite rating for this sample is 2.6 indicating a modest need for basic skills education.

Overall Training Needs

Identified training needs clustered in four areas: basic skills, personal skills, computer skills and interpersonal skills. Basic skills need identified as being most significant included GED classes and math skills in using a tape measure. Personal skills identified as most significant include problem solving, decision making and time management. Computer skills were identified as needed in almost 40% of the responding organizations. The most significant interpersonal skill needs include team skills, listening skills and skills in managing conflict. While all these areas of need are important, the reported need for interpersonal skills training is noteworthy.

Summary

There is a significant interest and perception of need for training and education among the companies represented in this sample. Specific areas of training need were identified, including:

- GED and basic math skills in measurement
- Basic computer skills
- Interpersonal and team skills
- Personal skills such as time management and problem solving

The employer identified employee reluctance to participate in training and education suggests further study. To the extent that employees are reluctant to participate in training, it will be important to identify and address the reasons as a new program is developed. The diversity of these organizations, their time constraints and production requirements, and the presence of more than one shift, as well as the reliance of these companies on informal learning methodologies all suggest the need for creativity in program planning and implementation. For example, cooperative learning methodologies may be a way to combine the need for interpersonal skills training with other basic skills training. Also, the use of the computer to teach and/or reinforce basic skills acquisition would allow for participants to attend classes at different times and learn computer skills while improving basic skills.

The fact that 42% of these manufacturing organizations, located in different communities, were willing to complete and return the survey speaks well for overall employer interest in adult learning in McNairy County.

V. Appendix: Results of *Adult Education at Work—Employer Survey* McNairy County Sample

— Does your company have a Training Department? **19% yes**

— Does your company have a staff member who focuses on training and education? **42% yes**

— How important is training and education for the future of your organization?
(Participants rated this item a 3.4 out of 5)

1 (not much) 2 3 (some) ● 4 5 (very)

— How receptive are employees in your organization to participation in education programs?
(Participants rated this item a 2.4 out of 5)

1 (not very) 2 ● 3 (some) 4 5 (very)

— To what degree are learning programs focusing on basic skills needed in your organization?
(Participants rated this item a 2.6 out of 5)

1 (not much) 2 ● 3 (some) 4 5 (a lot)

— Does your company have a room dedicated to training needs? **29%, yes**

— Does your company have one or more computers that you use for training programs? **38%, yes**

— Indicate the kinds of learning programs that you have had at your workplace with a check (✓).

a. 38% - Classes with instructor
b. 43% - VCR taped courses
c. 24% - Seminars or workshops
d. 14% - A course on computer
e. 4% - A resource center
f. 28% - Reading manuals and books
g. **67% - Coaching from supervisor**
h. **52% - Coaching from manager**
i. **67% - Help from fellow worker**
j. 42% - Trial and error by myself

— If you were going to offer a learning program focusing on adult basic skills at your worksite, what specific skills training would be most useful for your organization? Check (✓) all that would apply.

48% - Team skills
43% - Problem solving and decision making
38% - Listening skills
38% - Basic computer skills
38% - Managing conflicts
33% - Basic math skills (tape measures)
33% - Time management
33% - GED program
29% - Basic math skills (use of calculators)
23% - Basic math skills (fractions)
19% - Reading for understanding
19% - Reading work related text
19% - Basic math skills (percent)
5% - Writing memos, letters and reports
14% - Basic math skills (ratio and proportions)
9% - Basic math skills (metric conversions)

— Please share any additional comments or questions:

— Would you like someone from your local adult education program to contact you about the possibility of offering a basic skills learning program at your workplace? **29%, yes**

Step 2: Know Your Community

Contact Information for Local Programs

Develop a list of contact persons from existing local adult education and employment training programs. This list is important for gathering program information as well as for developing and maintaining ongoing relationships.

FORM

Contact Information

Agency or Organization	Program	Contact person	Address	Phone Number

Differences Between Local Programs

Understanding some of the differences in various local adult education programs is also important for marketing and planning. Developing a written table where the differences can be readily seen is one effective way to see the differences. The following is an example.

FORM

Program Differences

Agency or Organization	Program Goals	Methods of Instruction and Evaluation	Cost	Number of Participants

By assessing the services of other programs, you will be able to clearly say how your program is different from others, what needs your program fills that others do not, and ways to collaborate with other programs that complement your own.

B. MARKETING

Step 2: Know Your Community

Marketing and sales are often misunderstood, especially in the not-for-profit educational sector. Many times, marketing and sales are seen as self-serving attempts to manipulate people into buying things they do not want. Marketing materials can provide accurate, understandable information so that all parties can make good, informed decisions. Good marketing efforts entail a "win" for everyone: employer, union, employee, adult educator and community at large. Good marketing enables an adult education program to use its services to successfully meet the needs of community citizens and organizations.

Marketing is intentional and systematic communication regarding programs, products and services with potential customers in order to increase sales, usage and effectiveness.

All adult education programs use some kind of marketing plan. Most marketing plans are informal and unwritten. Most programs focus their efforts in areas where they have experienced past success. A written plan allows you to continue to do what works but also to make sound decisions about new and different areas of work.

A marketing plan requires good community data, careful thought and creativity. Some programs already have a marketing plan. For those this chapter will be a review. Others have completed pieces of a plan. For those, this is an opportunity to strengthen that plan. Still, others have never developed a marketing plan. If you have never completed a marketing plan, it is important to get something on paper. Do not let the task of completing the entire plan keep you from getting started. This chapter outlines the entire process, but also focuses on the key elements if you are just beginning.

Purpose of a marketing plan:
The marketing plan enables you to deliver the highest quality educational programs to the greatest number of individuals and organizations who best match the focus of your program, your capabilities and resources.

Before developing your marketing plan you will need to make sure that you have some key data elements:

- Data about your program (mission, goals, accomplishments, resources, financial model). This data was developed as a part of "Know Your Program"
- Data about your community
- Data about employers
- Data about other educational programs

Key Marketing Questions

Marketing plans come in a variety of forms. As long as a marketing plan is written, it can be simple and still be effective. The thinking behind the plan is more important than the plan itself. A marketing plan helps focus your efforts to promote your educational programs. It is based on data as well as your experience and hunches. In marketing, the word "product" is used. For adult education programs, the "product" is the educational services that are provided, such as classes, assessment, and curriculum development. Generally a market-

Step 2: Know Your Community

ing plan will include a written answer to the following questions:

1. What is the nature of our adult education program?
2. What are we "selling?"
3. What are the special features of our products?
4. Who are our potential customers?
5. How can we publicize our products?
6. How much is our product worth?

Each question is listed below with ideas and information for answering them.

1. What is the nature of our adult education program?

Using the information that you developed in Chapter 1 "Know Your Program," summarize your program strengths. This section should include your:

- Mission
- Fact sheet and accomplishments
- Distinctive features of your program
- Staff and capabilities
- Goals for the future

2. What are we selling?

What is your product? For most Adult Education Programs in Tennessee the product is a literacy class, a basic skills class, an English language class, or a GED program conducted in a class setting. Classes are offered in a variety of sites—many schools and some workplaces. Some workplace programs are customized to meet the particular needs of a work site or even a specific job. Based on your analysis of your program, you should describe your products and services concisely. Even if you primarily deliver GED programs, you may deliver them in several very different ways. You may actually have more "products" than you think.

3. What are the special features of our products?

Every product has certain features that make it distinct. These details are very important in the marketing process. They communicate the details about your program that help customers understand how it could be of value to them. As you think about your product(s), include program details such as:

- Specific program focus (reading, team skills, GED, memo writing, etc.)
- Method of delivery (individualized, computer-based instruction, class with

10-20 students and instructor, small group, etc.)
- Materials used (workbook, videos, etc.)
- Number of sessions, time involved, place, time of day, day of week, etc.
- Instructor(s) qualifications
- Flexibility to adapt program to specific employer needs.

Step 2: Know Your Community

An important aspect of any product is "distribution." Distribution involves the ways that a local Adult Basic Education program gets services to the customer. Distribution is delivering what the customer wants at a place and time, and in a way that the customer will buy it. Distribution is challenging in a local adult education program because the distribution process will vary according to the type of service.

Some services will be distributed through a central facility, such as a classroom or training room in a company. Some will be distributed through a central computer lab. Others may be downloaded through a central file server to a personal computer. Some, such as Internet, will be accessed locally using the community infrastructure. Some programs might be delivered at various community sites. Two factors are critical:

Flexibility – Adult Basic Education programs use as many ways to deliver its products as possible. Multiple approaches and options meet multiple needs.

Clarity – All stakeholders understand the different ways services are distributed.

Identify the probable distribution channels for the programs, products and services of your adult education program.

4. Who are our potential customers?

Many ABE programs describe adults who take classes as "students." In a workplace setting, some adults resist being called students because they have experienced failure in this role in the past. The word "customer" may feel like a stretch for most ABE programs. The customer is the organization, the group, or the individual whose interests are being served. This is a marketing term that service providers are adopting. You may have different customers for your program. One customer is the adult learner. Another may be the employer. Another may be the union. Where are your potential customers? What particular need(s) of your customers do you plan to meet? What customer(s) do you intend to serve?

For example, if a service is the delivery of GED classes at the work site using an instructor, videos and a workbook and the minimum class size is 10 students, then it may be difficult to market to small organizations. An organization with

Step 2: Know Your Community

a small number of employees cannot afford to have a large number of them tied up in a learning program at the same time.

ACTIVITY

Finding Your Market & Customers

Describe the potential market for your programs, products and services using the information from "Know Your Program," data from your community, your own knowledge and experience.

Identify Your Customers

Using the employer data and labor market information and your knowledge of other training and education service providers, identify your customer(s), including what you know about demographics, economic factors that impact customer, and particular customer needs.

☛ TIP

Roger Hansford and Sherrie Claiborne developed an ad campaign, supported by a 353 grant, for adult education programs called "Developing the Human Potential through Lifelong Learning: Adult Basic Education, and Investment in Tennessee." This advertising can be used for public service announcements and community awareness.

5. How can we publicize our products?

Advertising – Advertising and promotion involve communicating information about your local adult education program and its services to potential customers. The purpose of advertising and promotion is to help the potential customer get a better understanding of the value of the program so they can make a decision. Advertising is usually impersonal. It is not designed to communicate with individual people directly. Advertising is a method to initiate a contact. Advertising can be expensive and its effects often difficult to measure.

In a local adult education program, advertising can be effective when focused on a specific service. Costs can vary widely and advertising should be used sparingly and intentionally. Adult educators in Tennessee have successfully used advertising in local newspapers by sending press releases. Where these efforts have been most successful, they have reflected the specifics of the local program and the needs of the local community.

☛ TIP

Always include information of interest to employers in your newsletters. Add employers to your mailing list.

Newsletters – Our survey shows that a number of programs have newsletters that are sent to the local community members. Newsletter mailing rates for a not-for-profit organization are modest, allowing for wide circulation. An adult education newsletter is a way to advertise new course offerings, share information and highlight the people involved in the adult education program. A newsletter also keeps the name of the program before employers and builds familiarity.

Public Relations – While advertising is largely impersonal, public relations is a personal approach to communicating the uniqueness of an adult education

program. Unlike advertising, public relations involves personal relationships, conversations and dialogue. Public relations is inexpensive and offers the opportunity to interact with others about the program. A key form of public relations is customer service. Satisfied customers will create enormous good will, increase business by bringing new customers and many will continue to use services.

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Publicity - A form of public relations is publicity. Publicity is the process of sharing general information about a learning program through press releases, presentations or conference workshops. Some have termed publicity a form of "free advertising." For example, Jackson County Adult Education had an article in their local paper about an "Adult Education Craft Show," and an article about 124 graduating adult learners. Many programs send press releases to the local newspaper.

I find local publicity on adult education projects to be very effective.

—Carl Anderson
Johnson County

Direct Mail - Several programs reported that they send direct mailings to employers. Several ABE programs reported different types of mailings. Bill Potts at Perry County School sends a mailing to employers inviting them to a "Career Day" to talk to participants about job opportunities. Minnie Miller of Johnson County Adult Education sends a letter to employers that describes the ABE program, gives a schedule of classes, and asks that the organization include ABE registration information in their bulletins and newsletters.

The Center for Adult Reading and Enrichment in Jackson sends a professional looking brochure called "In Business with Literacy." The brochure is addressed to Madison County Business and Industry and describes customized classes. Greenville City Schools sends a flyer that says, "Let us create basic skills classes for your employees."

☛ TIP

Check it out—

- ☐ *Are your materials faded or worn looking?*
- ☐ *Is the print on your flyer straight on the page?*
- ☐ *Will the flyer appeal to a business person?*
- ☐ *Do your materials look too much like "elementary school"?*

Advertising and public relations help to "position" your adult education in the community by affecting the way people view your organization and its services. Your reputation (word of mouth from your students) and relationships with those in the community say the most about the quality of your work. However, businesslike publicity pieces are very effective also.

Whatever marketing you do as a local adult education provider will position your organization, its programs, products and services within your community—for better or worse. Positioning needs to be thoughtful and intentional.

6. How much is the product worth?

The financial model that you identified for your program in "Know Your Program" is a fundamental part of your marketing efforts. The heart of the

Step 2: Know Your Community

financial model is a financial statement reflecting the costs and revenues for your program and its products.

Included are costs for:

- Instructor compensation (including instruction, assessment, and evaluation of program)
- Books and materials costs per student
- Number of students needed for cost effectiveness
- Overhead costs such as rent, utilities, telephone, copying, and secretarial support

These costs are offset by revenues. These could include:

- Participant fees
- Company contribution of space, copying, secretarial support, storage, and equipment
- Company financial support of employee participation
- Public sector tax revenues

The financial plan provides information to evaluate the potential success of a learning program or product in a workplace setting.

Pricing is another component of a successful marketing strategy. Pricing depends on a variety of factors including costs, customers, policies, competition and volume of sales. Costs are the expenses involved in delivering your program. Some costs will vary according to the number of programs or participants, such as printing of specific program materials. Other costs will be fixed no matter how many programs you conduct, such as rent, salaries, etc. Other costs may be variable and not easily allocated to a specific program, such as monthly Internet service, office supplies, etc. All costs need to be considered when pricing your services.

The customers' ability and willingness to pay have to be considered in pricing services. Price is also affected by the customers' sense of need. Availability and pricing of similar services offered by other providers is useful.

Projected sales volume affects pricing. **Fixed costs** are offset by the amount of total sales. The more units sold, the lower the overall costs. The more participants in a class, the lower the overall cost of the teachers time. **Variable costs** for individual units should also go down with a higher volume of sales. Projections can be made and possible scenarios worked out. Careful and intentional pricing is advisable. Many program coordinators say they can provide a teacher if there are fifteen participants in the class. The number fifteen

represents a "break even" number. Below fifteen participants, the class is not cost-effective.

Be able to explain your plan and rationale for pricing your program and its services.

Plan for Marketing Your Program

The final product of this step should be a brief, clear document outlining the uniqueness of your program, its products, its potential clientele and particular strengths. Included in this document should be specific objectives for advertising and promotion, potential clients and approaches for effectively reaching those clients, budget and financial data, and a time line with specific responsibilities for accomplishing your program goals.

In writing your marketing plan, you should draw on the questions you have just answered. The following is an outline of a marketing plan which correlates with those questions.

Element of the Marketing Plan	Key Question
1. The Adult Education Program →	*What is the nature of our Adult Education Program?*
2. The Product/Service →	*What are we selling?*
3. Product Details →	*What are the special features of our services or products?*
4. The Customer →	*Who are our potential customers?*
5. Publicity →	*How can we publicize our product?*
6. Pricing/Funding →	*How much is the product worth?*

Step 2: Know Your Community

SWOT stands for strengths, weaknesses, opportunities and threats. This process can be used toœbetter understand or evaluate a problem or opportunity. The SWOT analysis is also a way for an adult education program to focus its thinking as a part of the planning process. The SWOT analysis will identify existing strengths, weaknesses, opportunities and threats affecting a particular community.

RESOURCE

SWOT Analysis Steps

1. Reproduce the SWOT Analysis Form (see following page for each participant.
2. Clearly identify the question for consideration and write it on an flip chart paper so everyone can see it.
3. Ask each individual participant to complete the SWOT analysis form focusing on the identified question or concern.
4. Individual responses are discussed and areas of agreement and difference are identified.
5. Group identifies major areas of difference and similarity. Group discusses identified areas and makes additions or modifications.
6. Group list of areas of similarity represents critical issues for group consideration. Group examines areas of difference for modification and inclusion on the list of critical issues. Group prioritizes these critical issues by reaching consensus or voting.
7. Group develops action plans for follow up.
8. Results are incorporated into planning process.

SWOT Analysis

INWARD FOCUS	OUTWARD FOCUS
Strengths • What are we good at doing in this adult education program? • Where are we growing? • What are our capabilities, capacity, resources? • What are our assets in terms of people, systems, organizations, finance, knowledge, reputation, etc.? • What have we accomplished?	**Opportunities** • What is changing in the community and world? • What resources are becoming available (role of computers, Internet)? • What issues, needs, concerns or demands are currently presenting themselves in the community?
Weaknesses • What are we not doing well as an adult education program? • Where are we not growing? • What are we missing to succeed? • What weaknesses do we have in terms of people, systems, organizations, finance, knowledge, reputation, etc? • What are some frustrations related to adult education in the community?	**Threats** • What do other adult education programs have that ours does not have? • How difficult is it for people to participate in education programs make a living in our community? • What changes are out there that could have a negative impact on our adult education program?

Step 2: Know Your Community

FORM

SWOT Analysis Form

INWARD FOCUS	OUTWARD FOCUS
Strengths • • • **SWOT Analysis Form** • • • • • •	**Opportunities** • • • • • • • • •
Weaknesses • • • • • • • • • •	**Threats** • • • • • • • • • •

Step 2: Know Your Community

Risks and Benefits

In the process of developing and marketing any product, there are risks and benefits. Your Adult Basic Education program should seek to manage the risks involved. Ways to do that include helping people make informed decisions, learn about programs and approaches, get involved, and work together. The SWOT analysis is one way to identify the risks and benefits involved in your marketing efforts.

SWOT Your Program

S TRENGTHS

W EAKNESSES

O PPORTUNITIES

T HREATS

Next Steps

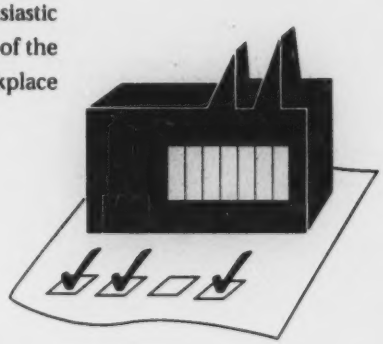
After completing your community information profile and your marketing plan, you are ready to contact specific employers who fit your marketing plan. Some of these may have indicated an interest and contacted you. The next step, "Know Your Workplace," focuses on ways to approach and understand the specific needs of a particular workplace so you can develop a proposal that will be affective for all parties.

Notes

Step 3: Know Your Workplace

"Well Toto, I guess we're not in Kansas anymore."
—Dorothy in the Wizard of Oz

A basic understanding of the workplace is an important ingredient of adult education at work. Every learning experience takes place in a context. A program may have the best teacher, the most effective curriculum, enthusiastic learners and the finest facilities, yet it may fail due to the particularities of the workplace. The purpose of this step is to explore the culture of the workplace and establish program goals.



This section will focus on:
- The culture of the workplace,
- A methodology for understanding the workplace,
- Identifying learning needs,
- Stakeholder benefits,
- Partnership building.

This step will result in written recommendations for program goals that will be the basis of a proposal to the employer for a specific learning program. The aim is to propose a learning program that fits both the ABE mission and the culture of the workplace.

A. CULTURE OF THE WORKPLACE

What is a workplace "culture?" There is a line in The Wizard of Oz where Dorothy looks at her dog, Toto and observes: "Well Toto, I guess we're not in Kansas anymore." In saying that, Dorothy realized that something was different, and that "something" is culture. A great deal has been written about organizational culture. Many authors agree that culture includes the following shared or common elements:
- **Language** – a way of communicating
- **Meaning** – the way experience is understood and the vocabulary used to describe it
- **Behavior** – the customs, rituals and traditions that are shared
- **Rules** – specific expectations that are talked about, printed or posted
- **Norms** – implied rules, the "ropes," the "way things are done around here"
- **Climate** – the way things "feel" in that place

Step 3: Know Your Workplace

- **Ways of understanding the world, the job and especially "outsiders."**
- **Skills** – special ways people do things and their abilities to do them.

Culture might be defined as "a pattern of shared basic assumptions that the group learned as it solved its problems...that has worked well enough to be considered valid, and therefore...taught to new members as the correct way...." (Schein, 1992).

Clues that might be used to describe an organization's culture can be found by observing its people, activities, facility and history. The following is an example of an organizational culture.

An Example of an Organizational Culture

"I walked across the rutted gravel of the parking lot toward the office. The door led by the desk of the receptionist who looked at me with an air of suspicion. I entered the factory and right away you could tell a difference. There were long rows of tables with dozens of women sitting behind them, each woman sitting in exactly the same way. Each worker quickly and methodically took a piece of cloth and sewed her piece of the garment. Methodically almost to a cadence, the cloth quickly moved through the assembly line. At the far end of the room, workers hurriedly boxed the garments and rolled them through the door toward a waiting truck. On the other end sat bolts of cloth stacked and ready. Ranging up and down the aisles between the tables were the supervisors watching with a critical eye. The noise from the machines was deafening, dozens of electric sewing machine motors spinning and whirring all at once. At either end of the room were fans set high into the walls. Huge, noisy flapping fans incessantly sucking the hot air from the factory. It was mid-afternoon in August and even the walls seemed to sweat. And far above the floor, overlooking the work, looking out of a large window from his air conditioned office stood the boss, in his wrinkled white shirt with rolled sleeves and loosened tie. It was a 'sweat shop,' in every sense of the word."

The culture described above was not receptive to adult basic skills education even though many of the employees had little formal education. In the view of management, basic skills were only minimally required for the jobs. As one supervisor said, "What you really need around here is a quick eye, steady hand and a lot of hard work." Employees were paid by the piece. They had little desire to participate in a learning program during work since it would cut into their pay. After work most were too exhausted to learn and many had family responsibilities. Management was struggling to keep the company competitive with foreign manufacturers. The factory seemed to be permeated with stress.

Step 3: Know Your Workplace

An adult basic skills education program was tried. It was advertised as "a way to get ahead." It was offered "free of charge." Only a few employees participated. Of those who did, almost all dropped out in a short time. The skills program was not supported by management in terms of release time or other incentives. The organization's culture did not support adult education at work.

Basic skills programs in workplace settings that are successful have as much to do with the culture of the particular workplace as they do the excellence of the basic skills program. A successful program must fit into the existing culture. A program in a manufacturing company with a traditional top down structure will be different from one in an organization where learning and continuous improvement have a high priority at all levels of the organization.

How do you identify the culture of an organization and its impact on learning programs?

"Sweat shops have poor attitudes. To them money talks. Education is low on the totem pole."

—Carl Anderson, Jackson County

B. METHODOLOGY FOR UNDERSTANDING THE WORKPLACE

The process of understanding a workplace takes time and thoughtfulness, and even with much care, may not result in a successful learning program. Because of this, it is important to plan your approach carefully. There is no simple way to understand the culture of a workplace, however, a basic understanding is necessary for a successful program. The following approach is based on *The Organizational Learning System Analysis*, a process developed by Dent Davis and used successfully in organizations. *The Organizational Learning System Analysis* looks at the learning needs of the employees and the company in the context of work. It is holistic and is most appropriate for a collaborative approach to adult learning at work. Adult educators who are new to a workplace setting may want to condense the process and choose only those activities that are the most comfortable.

☛ TIP

"Be acquainted with the workplace. The more you know, the better you will be able to serve, and the more valuable you will be."
Heather Nicely, Kingsport

Information from the analysis helps identify the corporate culture and the overall learning needs of the workplace. It does not identify the specific literacy needs of a specific job or worker. The process involves nine steps which should be adapted to meet the needs of the particular site:

Organizational Learning System Analysis

- Initial contact
- Organizational Information Form completed
- Tour of site

Step 3: Know Your Workplace

- Interviews with key managers and supervisors (30-45 min. each)
  - Manager/Owner
  - Human Resources Manager
  - Union representative (where applicable)
  - Supervisor(s)
- Focus group with employees (45-60 min.)
- Focus group with supervisors (45-60 min.)
- Survey instrument administered to selected group of employees
- Information analysis
- Report and validation

☛ TIP

"The enthusiasm of the company representative is very important."
Linda Shannon, Jefferson County

In addition to providing the educator with high quality information about the company and its learning needs, the process of conducting the analysis begins to build employee awareness and interest in the idea of a learning program.

In most workplaces, a contact person will be assigned to the educator. This person may be the company president, a human resource professional, a plant manager, or a supervisor. This individual will help schedule the various activities of T*he Learning System Analysis.*

☛ TIP

Collect all the information about a specific workplace in a folder or a notebook. Then it will be readily available when you develop a proposal or do additional work at that workplace.

Please adapt the suggestions in this section to meet your needs. Sometimes, for example, it will not be necessary or possible to survey even a percentage of employees. Whatever parts of this process you use, it is critical to respect the confidentiality of all involved. It is highly appropriate to report generalized summary data. It is very inappropriate to quote a specific employee without his or her permission.

Initial Contact

The initial contact with the workplace might be initiated by the employer. This has happened in 40% of the adult education at work programs reported by adult education professionals in Tennessee. The contact might also take place as a result of the marketing efforts of the local adult education program, or through more informal means. "Third party sites" such as civic club meetings, community gatherings, and training events, where adult educators informally interact with employers are often excellent sources of workplace contacts.

Organizational Information Form

Whatever the source of the contact, it is important to gather basic organizational data in order to determine the fit between your program and the culture and needs of the workplace. A form is often a good way to do this. The form can be filled out by the employer, Human Resource Director or by the adult education professional through a conversation with a workplace representative.

Whatever the means, the completed form contains information about the company. This information should be entered in a simple data base to allow for ongoing analysis and retrieval.

Step 3: Know Your Workplace

Below is a sample of an Organizational Information Form.

FORM

Organizational Information Form

Adult Education at Work

Thank you for your interest in the Pleasant County Adult Education Program. Please complete this information form. This information will assist us in planning an education program at your workplace. Some of these questions may not apply; feel free to alter them in whatever ways seem appropriate. Please attach a copy of your organization chart to this form. After completing the form, please send or fax it along with a copy of your organizational chart to the above address. Contact Ann Jones, ABE Coordinator, if you have any questions.

Name of Organization:_____

Address: _____

Telephone:_____ Fax: _____

Briefly describe the business are you in:

What are some of your products?

Who will be the key contact person for your organization?

Name: _____

Title: _____

How many employees work for this organization? _____

How many shifts are there? _____

What times does each shift begin and end?_____

Are there peak periods? If yes, when?_____

Are there shutdowns? If yes, when?_____

How many departments? _____

How many supervisors? _____

(continued)

Step 3: Know Your Workplace

Do you require a GED or high school diploma for employment? ☐ Yes ☐ No

Is there some form of group or team work at your work site? ☐ Yes ☐ No

Are there any quality initiatives underway in your workplace? ☐ Yes ☐ No

If yes, please describe:

Does your organization have a training department or staff with training responsibility? ☐ Yes ☐ No

Name of responsible person: _____

Title: _____

Telephone: _____

What kinds of education or training has your company been involved in during the last 2 years?

TRAINING PROGRAM	WHO WAS INVOLVED?	HOW LONG DID IT LAST?
1.		
2.		
3.		
4.		

Has your company done any employee assessment or testing for learning purposes? ☐ Yes ☐ No
If yes, what kind have you done?

Are assessments used in the hiring process? ☐ Yes ☐ No
If yes, what kind?

From your perspective what would be some of the key training needs for your company today?

Step 3: Know Your Workplace

Tour of Site

A tour of the workplace gives you a chance to observe the employees, the facility and the culture of the organization at work. In touring an organization, it is important to respect the organization's culture. One way to do that is to dress appropriately. If everyone, including the owner dresses informally, you would not want to tour the plant in a formal business outfit. A little informal inquiry before arriving is often helpful. If safety gear is required to tour the worksite, the person conducting the tour will probably provide the required gear. Be sure to respect the culture by doing whatever is required.

Most employers are happy to show you their company and its work. Sometimes, a manager will ask another employee to conduct the tour. This provides an opportunity for the adult educator to talk about the company with another employee. Observing the workplace in operation is useful for understanding how work flows through the company.

☛ TIP

"Take a plant tour and talk with employees and supervisors to find particular skills needed."
Peggy Davis, Trenton

ACTIVITY

Take a tour of the work site.

- **Observe:** Pay attention to detail—signs, bulletin boards, posters, newsletters, work being done, people, facility, and atmosphere.
- **Document your experience:** Make notes of your observations and reflections while you are touring or immediately after you leave. These will be valuable for the design your program plan.
- **Interact:** Smile, greet and converse with employees.

☛ TIP

"Dress casually! Employees have been working. Over dressing may make them feel uncomfortable."
Kim Gass, Greenville

Step 3: Know Your Workplace

ACTIVITY

The following Organizational Observation Form may be useful to help you focus your observation.

FORM

Organizational Observation Form

Adult Education at Work

Workplace: _____

Address: _____

Contact Person: _____

Telephone: _____

1. LANGUAGE
   - Spoken language: what kinds of speech do you hear? Grammar usage?
   - Are there languages besides English being spoken? *(May be a need for English for speakers of other languages.)*
   - Do people talk **with** others or **at** them? *(May be an indicator for team and interpersonal skills.)*
   - Vocabulary specific to workplace? *(May be an indicator of the kinds of basic skills most used.)*

2. ACTIVITY
   - What are employees doing? (What skills are being used?)

3. APPEARANCE OF FACILITY AND INDIVIDUAL WORK STATIONS
   - Lighting, noise level
   - Space allocation
   - Cleanliness

4. SPACE DEDICATED TO EDUCATION OR TRAINING
   - Is there a dedicated training room?
   - Is there equipment for learning such as books, computers, a white board?

5. PRINT ENVIRONMENT
   - Are there signs for information or directions?
   - Is there a newsletter that employees read?
   - Are there books, manuals in sight?
   - Are forms clear and easy to read?

6. CLIMATE
   - What is the energy level of employees?
   - What does the workplace "feel" like to you?
   - Are there motivational posters?

7. RULES
   - Is there a Human Resource Handbook?
   - Is there a company education or training policy?
   - Are there rules posted around the workplace? In the break room?

8. COMPUTERS
   - How much evidence of computers can you see?
   - What are they used for? (Production? Administration? Training and education?)
   - Who uses the computers?

9. SPECIFIC SKILLS
   - Do you see evidence of specific skills necessary for work at the workplace? Examples are such things as grading lumber, sorting inventory, processing paper or providing customer service.
   - Do people work on teams?
   - Is there evidence of calculators?
   - What types of machines are being used? (Certain machines require specific basic skills, a CNC computerized tool and die machine requires extensive math and computer skills. Word processing requires knowledge of specific software programs.)

10. NEW THINGS
   - Do you see evidence of new facilities, new employees, new machines, new activity? New things may indicate potential new learning needs and opportunities.

11. OTHER OBSERVATIONS AND COMMENTS

Step 3: Know Your Workplace

Interviews with Key Managers

An interview is a semi-structured conversation that will help you get to know the people involved in the organization and learn more about the organization's needs and culture. Interviews should be limited in number since each one will take from 30-45 minutes. The Organizational Information Form will provide a good place to begin. Simply asking the manager or owner who you should talk with will usually produce a list of individuals. You must then decide which of these would be most appropriate. These should then be contacted, a date and time set and the interview guide prepared. Among those most often included on the suggested list are these:

- Manager/Owner
- Human Resources Manager or Director
- Union representative (where applicable)
- Key Supervisor(s)

The interview guide is a list of questions for use during the interview. It is useful to prepare a sheet with the questions, leaving room to take notes. This sheet can then be copied and used for taking notes in each interview. Before preparing your questions, think about what you would like to learn from the interview. Avoid questions that can be answered with a simple "yes" or "no." Make arrangements to conduct the interviews during work time. Use your first interview to check out your questions to be sure they make sense in the context of a particular workplace. Don't assume anything. Remember your interview guide is only a guide. You may want to change the order of the questions depending on the flow of the interview.

A sample interview guide appears on the next page.

Interview Guide

ACTIVITY

Adult Education at Work

1. What do you do in your job?

2. How long have your worked here?

3. What kinds of changes have taken place at this workplace in the last couple of years?

4. Have any of the changes involved new technology? What kinds?

5. How do new employees learn about their job? What kind of training do they get?

6. How do people get promoted? What holds them back?

7. What kinds of upgrading programs would be useful here?

8. In what areas might people want to brush up on their reading, writing, math, and critical thinking skills?

9. What written material is the most difficult to follow?

10. If training was offered, what should it include?

11. Can you think of a work group or department in this workplace that might be interested in piloting a workplace education program?

☛ **TIP**

"Ask what skills the industry is going to require of employees beyond basic skills?"
Mary Elizabeth Faris, Franklin

Step 3: Know Your Workplace

Focus Group with Employees and Supervisors

Focus groups are a useful tool for understanding an organization, its culture and learning needs. A focus group involves 6-8 participants who meet together for 45-60 minutes to talk about specific questions or concerns. Often employees will be anxious about a focus group format. It is important to set participants at ease. Emphasizing confidentiality and explaining the purpose of the group helps to build rapport.

☛ TIP

"Try to talk to employees as a group."
Susan Greer, Sequatchie County

Although the number of focus groups could vary, generally you will want to meet with at least one group of employees and one group of supervisors. It is better not to mix these two groups. As you meet with them you will use an interview guide similar to the one used for the individual interview. You will also want to take some sort of abbreviated notes so you can remember what was said. However, it is important to let the participants know that you are taking notes and that the purpose is to get the general gist of what is being said not to quote anyone. It is difficult to facilitate a focus group and take notes. You may prefer to simply listen carefully and write your notes immediately after the focus group.

ACTIVITY

Conduct Focus Groups

Construct your focus group interview guide after you have completed your initial interviews. You may have a questions you want to add that are specifically for employees and/or supervisors. Schedule time between interviews and focus groups for reflection and note taking.

Survey Instrument Administered to Selected Group of Employees

A survey instrument can be a useful tool for gathering information to plan a learning program at a workplace. Surveys are a quick and economical way to get input from a large number of people. Surveys also allow for a high degree of anonymity. Because of limitations in resources and time, the survey should be very short and succinct. It should take no longer than five minutes to complete. You should administer it so that the confidentiality of participants is protected. This sample survey has a list of skills, attitudes, and knowledge that was developed as a part of the Tennessee Workforce Learning Project by Dent Davis in collaboration with Margaret Bott, Sherrie Claiborne, Teddy Cook, Hope Lancaster, Bobby Jackson, Jewell Jennings, and Susan Scott.

☛ TIP

"Always do interest surveys in order to include the entire plant."
Frank Brinkley, Sumner County

How many survey should you administer at a particular workplace? In a smaller company, a higher percentage is needed in order to obtain meaning-

ful results. In an organization of 50 employees, for example, as many as 45 should be surveyed. In an organization of 1000 employees, only approximately 250 employees would need to be surveyed.

Step 3: Know Your Workplace

ACTIVITY

Administer a survey like the following sample.

FORM

Learning Survey

Adult Education at Work

The Organizational Learning Survey asks for your opinion about learning at your workplace. Complete this form. Do not put your name on it. Your responses will be tabulated as part of a larger report.

Name of Your Workplace _____ Today's Date_____

1.How long, to the nearest year, have you worked at this workplace? _____

2. In the last two years, how many formal training or education experiences have you had? _____
Check (✓) the types of training or education experiences you have had.

a. ____ On the job training
b. ____ GED program
c. ____ Community college
d. ____ Course at workplace
e. ____ Public seminar or workshop
f. ____ Self-directed study

3. Check (✓) how you have learned at your workplace.

a. ____ Classes with instructor
b. ____ VCR taped courses
c. ____ Seminars or workshops
d. ____ A course on computer
f. ____ Reading manuals and books
g. ____ Coaching from supervisor
i. ____ Help from fellow worker
j. ____ Trial and error by myself

4. How important are education and training for your job? Check (✓) one.

VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	DON'T KNOW
a.____	b.____	c.____	d.____

Step 3: Know Your Workplace

5.How important are education and training in your organization? Check (✓) one.

VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	DON'T KNOW
a.____	b.____	c.____	d.____

6. Circle the number of the highest grade you completed in school.

ELEMENTARY SCHOOL	JR. HIGH SCHOOL	HIGH SCHOOL	COLLEGE	ADVANCED DEGREE
1 2 3 4 5	6 7 8	9 10 11 12	1 2 3 4	Master/Doctorate

7.Which word best describes your position in the organization? Check (✓) one.

____Senior Manager ____Manager ____Supervisor ____Hourly Employee ____Staff

8. If you saw an ad for these training courses at your workplace, which ones would interest you?

a. ____ Working Together as a Team
b. ____ Reading Charts and Tables
c. ____ Reading Manuals
d. ____ Math Skills Brush Up
e. ____ Computer Skills
f. ____ Problem Solving
g. ____ Communication Skills
h. ____ Get a GED
i. ____ Get a college degree
j. ____ Getting along with difficult people
k. ____ Help my children with their homework

WORKFORCE KNOWLEDGE, SKILLS AND ATTITUDES

Which skills do YOU think are the most important at your workplace?
Select (✓) your top twelve items from the following list.

Skills and Abilities

____Read work-related text
____Make work-related computations
____Write (memos, reports, orders etc.)
____Listen for understanding
____Talk respectfully
____Follow instructions
____Evaluate information
____Separate fact and opinion
____Ask questions
____Accurately perform work operations
____Organize work
____Solve work-related problems
____How and when to make decisions
____Manage time
____Cooperate with others
____Work on a team effectively
____Think creatively
____Think critically
____Use a computer
____Suggest improvements
____Take initiative
____Stay calm under pressure
____Set work goals
____Planning

Step 3: Know Your Workplace

Attitudes and Values

_____Dependability
_____Confidence
_____Getting along with others
_____Self-esteem
_____Self-awareness
_____Do the right thing (work ethics)
_____Accept and manage change
_____Accept people's differences
_____Desire to grow/advance
_____Volunteering to learn new things
_____Have goals for learning

Knowledge

ABOUT THE COMPANY

_____Mission and purpose
_____Policies
_____Standard procedures
_____Customers
_____Suppliers
_____Products
_____Special vocabulary
_____Quality
_____Where to go for help/information
_____Work flow

GENERAL KNOWLEDGE

_____GED or High school diploma
_____Diversity (cultural differences)

RESOURCE

Information Analysis

During the Organizational Learning System Analysis process you will collect information from four sources:

— Observations
— Interviews
— Focus Groups
— Survey

Analyze the information by following these steps:

1. The data should be available in a notebook or file folder.

2. Tally the numbers for the survey. It is often useful to figure percentages in the analysis of the information. An example would be the percentage of employees responding who indicated a desire for a learning program focusing on measurement.

Step 3: Know Your Workplace

3. Information from the employee focus group should be compared with the survey results. Similarities in data strengthen your findings.

4. Also, note where information from interviews are similar and different. This helps in identifying learning needs that are more widely perceived. The more widely the learning need is felt, the stronger the support from management and employees, and the greater the participation in the learning program.

5. Look for common themes, especially where information from the employees is similar and different from the information from managers and/or supervisors. Sometimes these differences can help in pinpointing needs and identifying appropriate program goals. Where the learning needs identified by the employees agree with those identified by management and supervisors, there is a much higher probability for a successful program. Where there is little or no agreement, success is much less likely.

☛ TIP

Use a yellow high lighter to mark the key words and responses that you want to remember. Use "stickies" and "colored "flags" to mark specific data you want to remember.

The process of information analysis will vary for each organization. The size of the organization makes a difference in the time and energy required for an analysis. Information from smaller organizations can be laid out on a desk top. The findings may be obvious. Information analysis from large organizations is time consuming. In larger organizations using a matrix to compare information is often helpful.

Complete a "matrix" for comparing information.

Matrix for Data Comparison

ACTIVITY Item	Manager(s) Interviews	Supervisors' Focus Group	Employee Focus Group	Survey of Employees	Observations
Learning programs that would be important for employees					
Learning programs that would be important for the company					
Perceived learning needs of employees					

Step 3: Know Your Workplace

If, for example, the data from these multiple sources on these three questions were largely in agreement, you would have a significant finding. You would have also identified some significant learning needs. The individuals, departments and functions of the company for whom those learning needs are important are the potential stakeholders for your learning program.

A stakeholder is someone for whom the process or the outcome matters.

Every identified learning need should have a corresponding stakeholder. The stakeholders for different learning needs will be different. You can identify one or more benefits for each stakeholder. Clear benefits are indicators leading to maximum commitment to and participation in a learning program. A matrix is also useful in identifying these factors:

ACTIVITY

Learning Needs & Stakeholder Benefits

Learning Needs	STAKEHOLDER BENEFITS			
	Plant Manager	Supervisor	Employees	ABE Program
1. Measurement	Less waste Higher profit	Higher quality More production	More product accuracy (bonus) and skills for ongoing career development	More enrollment and outcomes in GED programs
2.				
3.				

Where there is a strong consensus from multiple stakeholders of a perceived learning need and a clear benefit,there is a basis for developing a learning program. The goals for a learning program come from the statement of learning need and potential benefit.

ACTIVITY

Draft the information into a simple report. This report is an excellent tool for building relationships with employers. When a draft of the report is presented to company (and union, if applicable) representatives, it can be verified or amended based on their responses.

The following report is an example of a report written for an employer in Rhea County.

Step 3: Know Your Workplace

RESOURCE

Sample Report

The following is a report of the Adult Education at Work Employer Survey data for a large manufacturing company in Rhea County. Margaret Bott and her staff visited the company, participated in the interviews and focus groups and completed the initial tally of the data for the 1238 surveys.

The surveys were tallied on paper forms for each group of employees (staff, managers, etc.) And the totals entered in an Excel Worksheet. The Excel Worksheet was used to tabulate the survey data for this report. The following is an example summarizing question 3 found on page 7 of the XYZ Company Report. Each column is added and a percentage of that total computed. Of the 1238 respondents, 15% have participated in classes with an instructor at the workplace. (186 ÷ 1238 = .1502 or 15%)

☛ TIP

Be sure goals and expectations are clearly defined and understood between employer and ABE before implementation of the workplace program."
Diane Parvin, Cumberland County

3a	b	c	d	f	g	i	j
class instr	VCR tape	Seminar	computer	read	Coach	Help from	trail & e
114	135	45	20	171	397	887	631
49	25	42	11	34	34	35	43
5	3	5	1	4	10	25	23
18	8	17	9	14	11	13	15
186	171	109	41	223	452	960	712
0.150242	0.138126	0.088045	0.033118	0.180129	0.365105	0.775444	0.575121

The following report could be used as a "template" for surveying other companies. Many of the categories will be similar although the numbers and interpretation will differ. At first it may seem difficult to determine the findings and recommendations. Often a comparison of what was said in the interviews and focus groups, the survey results, your observations and some thinking time will identify the findings. The recommendations are based on what the company needs or employees say they want and what the adult education program can do or recommend as a resource to address the need. In doing this kind of a report for the first time, it is often easier to begin with a smaller company.

TENNESSEE DEPARTMENT OF EDUCATION
ADULT AND COMMUNITY EDUCATION DIVISION

Organizational Learning Survey Report

Prepared for:
XYZ Tennessee
Anytown, Tennessee

September 10, 1997

For information or questions contact:
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I. Introduction

This report describes the learning system of XYZ Manufacturing Company. This report was developed by Dent Davis, an independent consultant, and Margaret Bott, Adult Education Supervisor in Rhea County, and is based on data from the Organizational learning Survey which was administered to 1238 employees in June, 1997 as well as three interviews and three focus groups with employees and supervisors. The survey and report were completed as a part of the Adult Education at Work Project, sponsored by a 353 Grant from the Tennessee Department of Education, Division of Adult and Community Education. This report has six sections:

- Introduction
- Organizational Profile
- Findings and Recommendations
- Specific Training Needs Identified
- Conclusion
- Appendix on the results of the Learning System Survey.

II. Organization Profile

XYZ Manufacturing Company has been one of the leading producers of furniture for over twenty years. The Rhea County plant is one of a number of plants located throughout the United States. The company employs over 1800 people, 99% of whom are full time employees. Currently the company is undergoing significant change, including some increase in automated machinery, improvement of production processes, quality, and team training. This survey is intended to assist company personnel in planning and improving their training and education program.

The Workforce

At XYZ Manufacturing Company, the workforce is made up of 1,867 employees distributed across 16 departments and 3 shifts. The workforce sampled in this study has over 7,000 years of combined experience at XYZ with six being the average years of employment. Approximately 7% of the respondents report that they have worked at the company twenty years or longer. Twenty three percent have been employees of XYZ for eleven to twenty years and eighteen percent from 6-10 years. Thirty five percent have been employed from 2-5 years at XYZ and fifteen percent less than one year.

Employee Interest and Participation in Training

Employees as a whole display a significant interest in education generally and job related learning specifically. The company is presently engaged in a company-wide team training initiative as well as safety training and new employee orientation. To date, less than twenty percent of all employees have been through the team training program. Fifty percent of those responding indicate that training is very important to their job and most employees indicate a willingness to participate in training activities. Employees have participated in an average of .74 training experiences during the past two years. Participation in training during the last two years has varied. For example, 26% of employee respon-

dents reported no training experiences during the last two years while 6% reported three or more experiences. Over sixty percent of all the training reported by participants has been on the job training. Eighty percent of the employees responding are high school graduates and of the eighty percent, seventeen percent have at least some college.

Generally the employees of XYZ Manufacturing Company describe themselves and "their" company with pride, as knowledgeable, industrious and interested in doing a good job. Among most there seems to be a sincere interest in improvement, both for the employees themselves and the company. The company itself has a good "feel" to a person experiencing it for the first time. Clean, well lit, and well organized, XYZ Manufacturing Company is working to improve its processes, employees and products.

Changes in customer needs, demands for quality, employees, production, and technology will necessitate that more effort be invested in employee training in the years ahead. The recommendations made in this report are designed to assist those involved in planning for training and education programs.

The recommendations for training are based on the perceptions of the 1238 employees involved in the analysis. While this group seems representative and their perceptions reliable, their perspective is probably not representative of XYZ Manufacturing Company in all respects. Therefore, the recommendations in the report should be interpreted accordingly.

III. Findings and Recommendations

Opportunities for Learning

While the vast majority of employees report one or more training opportunities during the last year (74%), approximately one fourth indicate no opportunity. With XYZ's volume of business and number of employees, there will always be a problem trying to schedule training opportunities to maximize participation. It is common in most companies to find conflict between time for training and the need to accomplish work and serve customers. Time available for training at all levels and in all areas is a key predictor of both learning, improvement and growth in effectiveness.

At XYZ Manufacturing Company there are significantly more informal training opportunities (71%) than formal training experiences (29%). Even though the company has been heavily involved in training, we strongly suspect that there may be learning going on that the company might not be aware of. People are learning on their own and in informal ways. Approximately 11% of the learning experiences reported by employees involved learning experiences that have been self-directed. About fifteen percent of all the training experienced by employees of XYZ Manufacturing Company has taken place outside the company. Much of the learning that has taken place has been informal (trial and error, help, coaching, reading), while 24% report participating in formal classes and workshops. Usually formal training involves courses and workshops, while informal training includes things like one employee

telling another how to do a particular task. Both are effective. Effective informal learning can be strengthened by recognition of existing efforts.

Key Areas of Knowledge and Skills

Employees were asked to indicate key areas of knowledge, skills and attitudes that, if developed, would be most helpful for the success of XYZ Manufacturing Company at the present time. The items in the Knowledge, Skills and Attitudes list were developed in 1992, and based on the SCANS report (Secretary's Commission on Achieving the Necessary Skills)[1]. A total of 1238 employees responded: 20 managers, 64 supervisors, 35 staff and 1119 employees. The items are listed in order of identified importance with the most frequently indicated in bold.

The key skills employees identified as most important at XYZ include:

1) Follow instructions
2) Cooperate with others
3) Ask questions
4) Accurately perform work operations
5) Stay calm under pressure
6) Solve work related problems
7) Listen for understanding
8) Organize work
9) Talk respectfully

Key areas of knowledge include:

1) Quality
2) GED or High School diploma

Key attitudes that were identified:

1) Getting along with others
2) Dependability
3) Do the right thing (work ethics)

These areas of Knowledge, Skills and Attitudes represent a baseline description of what it takes to succeed as an employee at XYZ. Most of the areas identified are consistent with a Quality based manufacturing organization. Those responding indicated that the GED or High School Diploma is an indicator of basic skills achievement as well as an employee's initiative, persistence and ability to plan and follow through activities to completion. It is important to note the importance of items having to do with interpersonal skills: getting along with others, asking questions, cooperation, listening, talking respectfully. Strengthening these areas of knowledge, skills and attitudes among new and existing employees should increase overall organizational effectiveness and positively affect employee turnover.

[1]What Work Requires of Schools: A SCANS Report for America 2000, U.S. Department of Labor, June 1991.

Communication

In most companies communication is cited as a very important factor for work effectiveness. Communication happens between individuals, groups, departments, and across the various levels and functions of an organization. At XYZ Manufacturing Company employees describe communication as reasonably good, although hindered by a number of factors which include: the size of the company the number of shifts, changes brought on by growth in business, and the nature of the work itself (multiple products and production changes). The company is committed to good communication (and continuous improvement in this area), as evidenced by various meetings, attention to visuals (such as bulletin boards), the team training program, the emphasis on quality, and the communications system itself. However, there is a need for additional training and skill in interpersonal communication. This need was identified by participants from all levels and departments represented in this study. This need should be addressed in part as more employees complete the team training program. To date less than 20% of XYZ employees have completed this course.

IV. Specific Training Needs Identified

A variety of training needs were identified by the employees of XYZ. In addition to various kinds of technical training employees indicate a need for additional skills for working together as a team (communications, problem solving, decision making, conflict management). Employees seemed to show a particular interest in computer training (PC literacy) and training in problem solving. Employee perceptions are diverse, but seem to mirror those of management and supervisors for the most part.

The following are training and education course recommendations based on the results of this study:

1) Interpersonal relations, Communication and Team skills training.

- Communication skills including talking and listening.
- Collaboration, including team work within and between departments.
- Understanding style differences.
- Conducting meetings, working together effectively, managing conflict, giving and receiving feedback, making decisions, and group problem solving.

2) Computer training:

- Provide a basic level of computer training for all employees as appropriate. The identified need was on the use of PC work stations.
- Training on programs specific to company needs (production, finance, word processing, communication, etc.).

3) Higher level math skills:

- Math skills such as percentage and measurement, and perhaps basic level statistics.
- Skills in analysis and problem solving.

4) Reading and writing:

- •The use of manuals and other company specific reading materials, such as pattern books.
- •Writing for record keeping and communication of critical information, especially in the Quality environment of XYZ.

The diversity of the work at XYZ, the time constraints and production requirements built into a high performance manufacturing environment, and the presence of more than one shift, as well as the widespread use of informal learning methodologies all suggest the value of creative and collaborative program planning and implementation in training and education. For example, cooperative learning methodologies could be utilized in basic skills training in order to reinforce the interpersonal skills training efforts presently underway in the team training process. Also, the use of the computer to teach and/or reinforce basic skills acquisition would allow for participants to attend classes at different times and learn computer skills while improving basic skills. The coordination of training efforts as well as collaborative efforts with other organizations could leverage existing resources to achieve greater results as well as employee involvement.

V. Conclusion

Learning and continuous improvement go hand in hand. Learning by those involved at XYZ Manufacturing Company takes place in different ways. The fact that half of the 1238 employees responding to the survey identified education and training as important for their job and the company, that eighty percent of the respondents have completed a GED or High School diploma, that 30% want to get a college degree, and that many participants indicated a desire to learn all are excellent indicators for the future. The Adult Education Office of Rhea County would like to assist XYZ as it continues to strengthen its learning program in the future. This could be done through the offering of courses such as those mentioned above, either on site or at the adult education learning lab in Dayton, or through collaboration in the design and implementation of classes to address specific learning needs would be another.

RESOURCE

VI. Appendix: Results of Learning Survey (1238 Responses)

1.How long, to the nearest year, have you worked at this workplace? **2299 years total. (15.0 avg.**

2.In the last two years, how many formal training or education experiences have you had? **.74 avg.**

(26% of employees 0 training experiences reported; 50% employees: 1; 17%: 2 experiences; 6%: 3 or more training experiences)

Check (✓) the types of training or education experiences you have had.

a. **60%** **On the job training**
b. 2% GED program
c. 5% Community college
d. **14%** **Course at workplace**
e. 8% Public seminar or workshop
f. **11%** **Self-directed study**

3.Check (✓) the kind of training you have done at your workplace.

a. 15% Classes with instructor
b. 14% VCR taped courses
c. 9% Seminars or workshops
d. 3% A course on computer
e. 18% Reading manuals and books
f. **37%** **Coaching from supervisor**
g. **76%** **Help from fellow worker**
h. **56%** **Trial and error by myself**

4.How important is education and training for your job? Check (✓) one.

a. **50% Very important** b. 33% Somewhat important c. 14% Not very important d. 3% Don't Know

5.How important is education and training in your organization? Check (_) one.

a. **47% Very important** b. 36% Somewhat important c. 10% Not very important d. 7% Don't know

6.Circle the number of the highest year you completed in school.

80% High School graduates 17% At least some college

7.Which word best describes your position in the organization? Check (_) one.

0 Senior Manager 20 Manager 64 Supervisor 1119 Hourly Employee 35 Staff

8. If you saw an ad for these training courses at your workplace, which ones would interest you?

a. **33%** **Working Together as a Team**
b. 9% Reading Charts and Tables
c. 5% Reading Manuals
d. 16% Math skills Brush Up
e. **56%** **Computer skills**
f. **32%** **Problem solving**
g. **24%** **Communication Skills**
h. 9% Get a GED
i. **30%** **Get a college degree**
j. **25%** **Communicate better at work**
k. 14% Help my children with their homework

WORKFORCE KNOWLEDGE, SKILLS AND ATTITUDES

Which skills do YOU think are the most important at your workplace? Select (✓) your top twelve items from the following list.

Skills and Abilities

15% Read work-related text
11% Make work-related computations
12% Write (memos, reports, orders etc.)
47% Listen for understanding
44% Talk respectfully
66% **Follow instructions**
21% Evaluate information
20% Separate fact and opinion
54% **Ask questions**
53% **Accurately perform work operations**
48% Organize work
53% **Solve work-related problems**
35% How and when to make decisions
42% Manage time
55% **Cooperate with others**
41% Work on a team effectively
26% Think creatively
10% Think critically
16% Use a computer
42% Suggest improvements
20% Take initiative
54% **Stay calm under pressure**
41% Set work goals
29% Planning

Attitudes and Values

55% **Dependability**
37% Confidence
58% **Getting along with others**
28% Self-esteem
19% Self-awareness
50% **Do the right thing (work ethics)**
31% Accept and manage change
29% Accept people's differences
35% Desire to grow/advance
33% Volunteering to learn new things
23% Have goals for learning

Knowledge

ABOUT THE COMPANY
19% Mission and purpose
29% Policies
32% Standard procedures
28% Customers
13% Suppliers
23% Products
6% Special vocabulary
56% **Quality**
26% Where to go for help/information
30% Work flow

GENERAL KNOWLEDGE
55% **GED or High school diploma**
7% Diversity (cultural differences)

Step 3: Know Your Workplace

C. WRITING GOALS

The following would be an example of a goal based on the data above:

— To raise measurement accuracy in the cutting department in order to increase the product quality and lower waste.

Goals can be written in different ways. Whatever the form, it is important to clearly tie together the learning need, benefits, and outcomes in such a way that it will be understood by multiple stakeholders. There may be more than one goal for a learning program. It is unlikely that there will be more than a few that are shared by multiple stakeholders that are also tied to clear benefits.

Make goals **S M A R T**

S **Specific** (What specifically do you hope to accomplish?)
M **Measurable** (How will you know when you have achieved the goal?)
A **Attainable** (How much can be attained?)
R **Realistic** (Educators KNOW that learning is a process and takes time. How much time will it take?)
T **Timely** (What is a reasonable time frame for attaining the goal?)

☛ TIP

"When you are setting goals, don't overstate what you can do."
Bobby Jackson
Harriman

Once the data has been analyzed, write a draft of the goals for a learning program in the organization. Potential goals for a learning program should be written in summary form. Get feedback from the stakeholders about the accuracy of the goals and their importance to the stakeholders.

It is useful to prepare and present a written summary of the results of the analysis of the organization's learning needs. Such a report should be very succinct and contain data to support your findings and identified learning goals. It should also contain preliminary suggestions regarding a program to address the learning needs of the company.

☛ TIP

"Sell your program— show benefits to the company."
Patti Chandler
Lawrence County

When the summary of the results of your analysis is complete, make an appointment with the employer to share the results. This is also a good opportunity to determine the interest of the employer in proceeding with an adult education program at their workplace. The goal is to secure a commitment from top management to proceed with the proposal and the guidelines for its acceptance. Since the process of developing a proposal is time consuming it is best to have some indication of the employer's interest before proceeding.

D. PARTNERSHIP BUILDING

Step 3: Know Your Workplace

The process of carrying out the *Organizational Learning System Analysis*™ can often form the basis of a lasting partnership involving more than one learning program at a work site. Widespread employee involvement at all levels of the organization, feedback and the development of findings that could have value for the organization and its people—all help to build a sense of partnership.

Effective partnerships are based on:

- Clear outcomes
- Widespread involvement
- Structured relationships
- Purposeful interactions
- Win-win relationships with benefit to all parties.

☛ TIP

"Develop good relationships with plant management."
Ralph Cochran
Haywood County

Partnerships evolve over time. An effective *Organizational Learning System Analysis* can be an effective step in the partnership process. Most adult education coordinators say the building the relationship with the owners, managers, supervisors, and office staff of the workplace is one of the most important investments they can make to assure a successful program.

Next Steps

The goals and summary report of findings developed in this section become the basis of a proposal to the company. For example, a goal may be to offer a traditional GED program offered at the worksite to enable people to be eligible to take a technical training course. Or the goal may be a customized refresher course in math to prepare the employees of a specific department to use statistical process control.

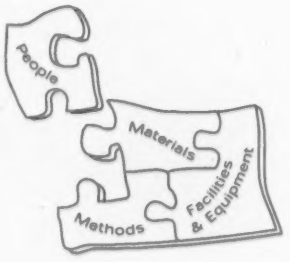
After the company's learning system and needs have been analyzed, learning goals have been identified, and a learning program has been discussed and approved (in concept) with top management, the next step is to identify appropriate resources for use in the learning program. It is only after the identification of program goals based on workplace needs and the identification of available resources that a formal program proposal, plan, and letter of agreement with the employer can be finalized.

Notes

Step 4: Know Your Resources

> *re•source: a new or reserve source of supply or support...available means...immediate and possible sources of revenue*
>
> —Webster's New Collegiate Dictionary

Successful adult education at work programs have carefully matched the needs of a local company and the resources of their adult education program. The foundation of a successful workplace program is a written letter of agreement between all parties. This letter of agreement will be addressed in the next chapter: "Know your Plan." A good agreement is based on an effective plan that is proposed to the employer. Effective plans require resources. Many public officials say that available resources are diminishing, so education programs for adults are finding creative ways to stretch existing resources or collaborate in developing new ones.



This step will result in the identification of the resources necessary to meet the goals of the program. As resources shrink and the pressure builds for programs to deliver measurable outcomes, many adult education programs are finding a need to look "outside the box" for effective resources. Program supervisors ask themselves, "Are there any curriculum resources that may not be readily apparent that would be effective for this situation?" Or they may say, "Could administration and instruction be co-opted from the company or from other sources?"

Resources for adult education at work can be grouped in four general areas:

- Human Resources
- Materials
- Methods
- Facilities and Equipment

A. HUMAN RESOURCES

The human resources available for adult education at work are the people who are involved in an adult education program. These include the educator, company personnel, union representatives, students or participants, and other people outside the company.

Step 4: Know Your Resources

Adult Education Practitioner

A critical resource is the adult education practitioner. In workplace settings, adult education practitioners are referred to in different ways. In some cases, the word teacher is used while in others instructor or trainer is used. The culture of the workplace will usually dictate the way employees will refer to the adult education practitioner.

Many of the skills already developed by adult education program managers in selecting, training and evaluating teachers can be applied for adult education at work. In a workplace setting it is not uncommon for managers, staff or union representatives to be involved in the selection and evaluation of a teacher. In a work setting the specific situation of the company will often impact the kind of individual who is needed. The culture of the workplace is a factor in determining the type of qualifications a practitioner needs. For example, the workplace may be a factory with three shifts and a need for an instructor after each shift. One workplace may mandate a basic skills program and another may provide the program on a voluntary basis. The information gathered in "Step 3 – Know Your Workplace" will be very useful in understanding the specific needs of the company.

Practitioners who have had personal experience working in similar work environments is very effective. These educators can say with confidence, "I know what it is like on the shop floor." While a similar work experience is often useful, it is not necessary. Many effective teachers can empathize with the participants in their programs and respect the participants' work situations.

☛ TIP

Teachers at a worksite are working for the same employer as their students. They must be accountable there. Working at a worksite is not the same thing as working in a school setting. Prepare your teachers.
Sarah Campbell
Marshall County

In selecting a teacher, especially when other stakeholders are involved, a written description of the desired qualifications is valuable. Qualifications can include such things as educational background, work experience, and teaching experience in the workplace. A written description of the necessary qualifications ensures that all parties involved are clear on the kind of professional to be selected. Qualifications can also be written in the form of a position description. Qualifications for workplace educators are developed in response to practical questions that surround every learning program. For example, depending on the goals of the program, prior experience in a workplace educational program will be important or will be unnecessary. For example, if a traditional GED preparation class is offered at a worksite, it may not be necessary for a teacher to have workplace experience. The position description of the educator clearly outlines the requirements and prevents assumptions that might become the source of conflict. Spelling out the details ahead of time can increase program effectiveness.

Step 4: Know Your Resources

Workplace educators play a variety of roles. They teach basic skills, serve on the Workplace Education Team, and interact with employees at all levels of the organization. Educators are often responsible for setting up an attractive learning environment, recruiting participants, and reporting to management. Unlike traditional adult education programs, the educators are accountable to both the adult education program and to the employer.

According to Tennessee ABE Supervisors, an effective workplace teacher has the following characteristics:

- Holds educational credentials
- Relates well to employers and employees
- Establishes rapport with others easily
- Is comfortable in a non-traditional learning environment
- Is flexible and adaptable
- Has excellent communication skills
- Has experience teaching adults and administering assessments
- Knows how to apply adult learning theory
- Can adapt workplace materials to curriculum items when needed
- Writes clear and well organized reports

☛ TIP

In a work setting, relate as one adult to another—never take an authoritative role. Be a coach, mentor, cheerleader and facilitator of learning.
Barbara Brown
Davidson County

Most good teachers can work in a wide variety of settings. However, the workplace presents unique challenges and teachers may need specialized staff development opportunities for their particular setting. An effective educator is a key component of an thriving workplace program.

Participants

Employees participate in programs for different reasons. These reasons depend in part on the goal of the program as well as the employee's own goals. The program goal might be to provide a worksite GED program. In this instance, the program is voluntary, and it is up to the educator and/or the Workplace Education Team to recruit participants. The program goal may be to provide basic math to a group of employees must be prepared for statistical process control. In this case, the program might be mandated by the employer. The goal of the program may be to provide foundational skills so employees can take advantage of training opportunities offered by the Human Resource Department. In this instance, employees might be highly motivated to participate. Each situation will be different. In every situation, without participants, there would be no program. Therefore, it is very important to meet the participants' needs, or a common phrase in businesses today is to be "customer driven." The participant is the customer and the employer is the customer as well.

☛ TIP

Be sensitive to the employee's body language. Sometimes they are too tired to have a long session, be flexible.
Susan Williamson
Lenoir City, Tennessee

Step 4: Know Your Resources

Adults who participate in workplace programs bring with them a wealth of knowledge and experience. This is especially true in a work setting where employees may have been working for years. An employee may score low on a math assessment, but might be an expert at a particular kind of measurement required by her job. The employees who come to the basic skills classes are usually very knowledgeable about the workplace itself.

In workplace settings, participants will often help teach other participants. Most learning in the workplace happens informally and is the result of employees helping or coaching one another. The process of participants sharing their knowledge and experience is one that is beneficial for all concerned.

☛ TIP

Try to promote bonding as a group and encourage peer tutoring. They can then encourage and help each other between classes.
Hope Lancaster
Putnam County

Employees, Managers and Supervisors

Fellow employees, managers, and supervisors are other human resources. In every organization there are individuals at all levels who are skilled communicators. Using these people to assist in the class leadership enriches the learning experience for everyone. In one mid-sized manufacturing company, for example, an educator invited the company's financial secretary to demonstrate a critical application of math skills. Collaboration with company personnel enriches a learning program and strengthens its relevance for the workplace.

☛ TIP

Develop a close working relationship with the Human Resources Department.
Jan Stelzman,
Hamblen County

Many ABE program managers who have had successful workplace programs report that it is very important to build an effective relationship with the company supervisors. Company supervisors are often under pressure to assure production. There is a tension between "getting the goods out the back door" and "continuous learning." Supervisors under pressure may resent the release time given to employees unless they are fully informed about the program and supportive of its goals. Supervisors who serve on the Workplace Education Team have firsthand knowledge about the program and this may help them to be supportive when there is pressure for production. The educator plays an important role in building relationships within the company. The more knowledgeable educators are about their business partners, the more effective they will be in reaching the goals of the learning program both for the learners and the employers.

☛ TIP

Develop a good relationship with the plant manager.
Ralph Cochran
Haywood County

Union Representatives

Union representatives are excellent partners. Some unions have access to training resources that also might support the adult education at work program. Many unions are strongly committed to increasing employee basic skills and have access to excellent curriculum materials, learning program designs, and sometimes funding that can strengthen adult education efforts in work settings.

Using people from within the company can have a very positive effect in building acceptance of the program and commitment of employees. Employees who see managers participating, or union representatives or supervisors often conclude that the program is important and worth their time.

Subject Matter Experts

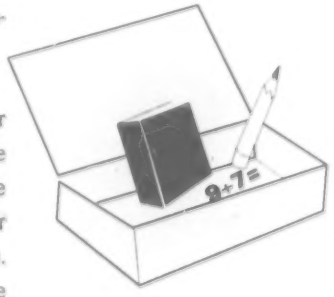
Subject matter experts from either inside or outside the organization might also be effective resources for adult education at work. In one learning program, the educator brought in a teacher from a local community college to speak on Total Quality Management during a class on math skills. This expert was able to demonstrate some important applications of the math skills being learned, as well as talk about possible employment opportunities for those who went on to master the skills of statistical quality control and Total Quality Management. In a furniture making factory in middle Tennessee, the educator asked a supervisor to give a mini-course on the wood used in the furniture making process. This supervisor had learned about the wood as a hobby. The participants were very interested as they used the wood every day in the manufacturing process. The teacher adapted the content of the mini-course for basic skills instruction including reading and writing.

Workplace Education Team

The Workplace Education Team (discussed in fully in "Step 5 - Know Your Plan") is a valuable resource in adult education at work. Effective partnership relations with company personnel can greatly add to the effectiveness of a program. In some companies there are existing groups or teams designed to support the training function of the company. Working with such a group or developing one may be extremely useful.

B. MATERIALS

There are many different kinds of instructional materials available for workplace programs. The purpose of this section is not to list commercially prepared materials for adult education at work. Most adult education teachers have access to vendor's catalogs where commercial texts are described and can be purchased. The purpose of this section is to direct the adult education professional to effective resources for other types of materials.



Adult educators have been using a wealth of creative program resources for years. Many of these will be very useful in workplace situations. Because of the unique needs of today's workplaces innovative adult education programs are adapting resources in new and different ways. In addition there are a number of material resources specifically designed for workplace education programs. A key question that will be asked by employers, is "What are basic skills?" The

Step 4: Know Your Resources

"[We] all seek a particular kind of learner, one who can put knowledge and skills into practice as a productive worker, a responsible citizen, and a more complete human being."

William Brock
Chairman of SCANS

answer determines what kinds of goals the program is likely to pursue. The SCANS[1] Report from the U.S. Department of Labor is a valuable resource for defining basic skills needed in the workplace.

SCANS Report

The U.S. Department of Labor formed the Secretary's Commission on Achieving the Necessary Skills (SCANS) to study the kinds of competencies and skills that workers must have to succeed in today's workplace. The Commission spent a year interviewing people in many different types of jobs, at all levels and recorded the skills and competencies those people needed to do their job successfully. According to the report, the Commission's fundamental purpose is to encourage a high-performance economy characterized by high-skill, high-wage employment. What Work Requires of Schools is the title of the SCANS report. This 61 page report defines the five competencies and three-part foundation that constitute the SCANS skills. SCANS outlines three foundational skills and five workplace competencies.

FORM

SCANS—A THREE-PART FOUNDATION

The three foundation skills are basic skills, thinking skill, and personal qualities.

1. BASIC SKILLS: *Reads, writes, performs arithmetic and mathematical operations, listens and speaks*
   - **Reading**—locates, understands, and interprets written information in prose and in documents such as manuals, graphs, and schedules
   - **Writing**—communicates thoughts, ideas, information, and messages in writing; and creates documents such as letters, directions, manuals, reports, graphs, and flow charts
   - **Arithmetic/Mathematics**—performs basic computations and approaches practical problems by choosing appropriately from a variety of mathematical techniques
   - **Listening**—receives, attends to, interprets, and responds to verbal messages and other cues
   - **Speaking**—organizes ideas and communicates orally

2. THINKING SKILLS: *Thinks creatively, makes decisions, solves problems, visualizes, knows how to learn, and reasons*
   - **Creative Thinking**—generates new ideas
   - **Decision Making**—specifies goals and constraints, generates alternatives, considers risks, and evaluates and chooses best alternative

[1] *What Work Requires of Schools: A SCANS Report for America 2000*, U.S. Department of Labor, June 1991.

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- **Problem Solving**—recognizes problems and devises and implements plan of action
- **Seeing Things in the Mind's Eye**—organizes, and processes symbols, pictures, graphs, objects, and other information
- **Knowing How to Learn**—uses efficient learning techniques to acquire and apply new knowledge and skills
- **Reasoning**—discovers a rule or principle underlying the relationship between two or objects and applies it when solving a problem

3. PERSONAL QUALITIES: *Displays responsibility, self-esteem, sociability, self-management, and integrity and honesty*

- **Responsibility**—exerts a high level of effort and perseveres towards goal attainment
- **Self-Esteem**—believes in own self-worth and maintains a positive view of self
- **Sociability**—demonstrates understanding, friendliness, adaptability, empathy, and politeness in group settings.
- **Self-Management**—assesses self accurately, sets personal goals, monitors progress, and exhibits self-control
- **Integrity/Honesty**—chooses ethical courses of action

FIVE WORKPLACE COMPETENCIES

1. RESOURCES: *Identifies, organizes, plans, and allocates resources*

- **Time**—selects goal-relevant activities, ranks them, allocates time, and prepares and follows schedules
- **Money**—uses or prepares budgets, makes forecasts, keeps records, and makes adjustments to meet objectives
- **Material and Facilities**—acquires, stores, allocates, and uses materials or space efficiently
- **Human Resources**—assesses skills and distributes work accordingly, evaluates performance and provides feedback

2. INTERPERSONAL: *Works with others*

- **Participates as Member of a Team**—contributes to group effort
- **Teaches Others New Skills**
- **Serves Clients/Customers**—works to satisfy customers' expectations
- **Exercises Leadership**—communicates ideas to justify position, persuades and convinces others, responsibly challenges existing procedures and policies
- **Negotiates**—works toward agreements involving exchange of resources, resolves divergent interests
- **Works with Diversity**—works well with men and women from diverse backgrounds

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3. INFORMATION: *Acquires and uses information*
- **Acquires and Evaluates Information**
- **Organizes and Maintains Information**
- **Interprets and Communicates Information**
- **Uses Computers to Process Information**

4. SYSTEMS: *Understands complex inter-relationships*
- **Understands Systems**—knows how social, organizational, and technological systems work and operates effectively with them
- **Monitors and Corrects Performance**—distinguishes trends, predicts impacts on systems operations, diagnoses deviations in systems' performance and corrects malfunctions
- **Improves or Designs Systems**—suggests modifications to existing systems and develops new or alternative systems to improve performance

5. TECHNOLOGY: *Works with a variety of technologies*
- **Selects Technology**—chooses procedures, tools or equipment including computers and related technologies
- **Applies Technology to Task**—understands overall intent and proper procedures for setup and operation of equipment
- **Maintains and Troubleshoots Equipment**—prevents, identifies, or solves problems with equipment, including computers and other technologies

The SCANS competencies and skills have led many basic skills teachers to consider what employees need to know in order to succeed in the workplace and how this relates to basic skills. Most needs identified by employers will fall somewhere within the SCANS skills and competencies. This provides a useful framework for purchasing materials for the workplace or developing materials based on specific needs in a particular workplace.

O*Net (Occupational Information Network)

O*Net is a comprehensive database system for collecting, organizing, describing, and disseminating information on worker attributes and job characteristics. O*Net is available to everyone with a graphical connection to the Internet. It replaces the Dictionary of Occupational Titles (DOT). O*Net contains information on skills, knowledge, abilities, work content and the context in which work is done. O*Net information will help educational service providers better understand what people need to know and be able to do in a wide variety of work settings. O*Net will be a key factor in workforce development initiatives and adult education programs will want to be familiar with it. O*Net is helpful in identifying what basic skills a person needs for a particular job.

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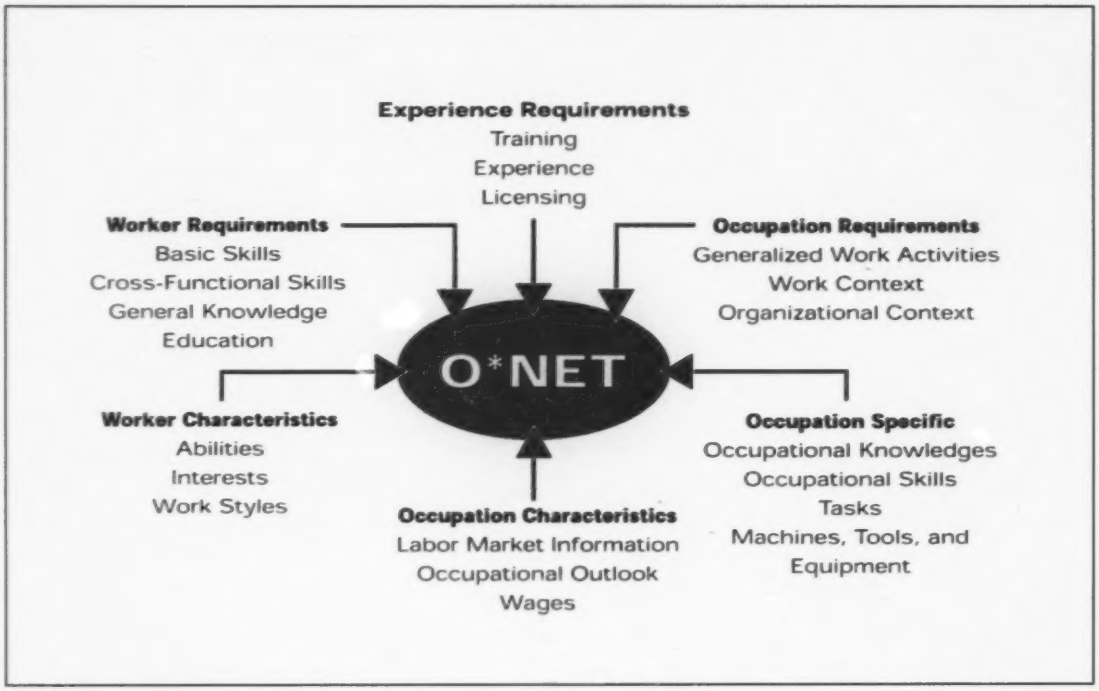
The O*Net database identifies, defines, and describes the comprehensive elements of job performance in the changing world of work. When the database is fully functioning, an adult educator can put the name of a job or occupation into the database and identify the skills and knowledge a person needs to be successful in that job or occupation. The Internet provides access to many resources that can be very helpful in planning a workplace education program.



Developing Materials

There are many excellent materials that have been written for adults can be adapted for the workplace. Most commercially prepared materials for the workplace deal with work related scenarios, however, these will not be specific to a particular workplace. For programs that have a goal of teaching a particular skill in a particular context, it may be necessary to develop curriculum materials using the resources that are available in the workplace itself. Company manuals, financial statements, problems and processes all can be extremely useful as instructional materials, either by themselves or as supplements to prepared materials.

Many workplace educators use a combination of commercially prepared materials and materials they have prepared themselves. Customizing materials is often easier after a teacher has spent time in a particular workplace and has gotten to know the basic skills requirements of the various jobs. When teach-

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ers have the freedom to visit the plant floor and spend time talking to the individuals on the front line, they gain a better understanding of employees and their perception of their needs. Effective workplace education programs combine educational resources and occupational resources.

Use of the Internet in Workplace Education

A major trend in the resource development for workplace basic education programs is the use of the Internet. This has a number of advantages. Often the resources are free or at very low cost. A practitioner can access many current materials quickly and easily. Because these materials can be downloaded and may even allow duplication, they can be used very efficiently. Materials can be copied on an as needed basis and the need for storage is minimized. Some of the available materials have been developed as a part of adult education projects funded through state or federal grants and are often accompanied by narrative reports describing the experience of their use in adult education programs. These can be very useful in adapting materials for specific situations.

☛ TIP

Understand why students are participating and teach to those reasons.
Sandra Long
Jackson, Tennessee

Several major sources of information on adult education Internet materials and resources include:

Title	Source	Internet Address
Ask ERIC	ERIC, Syracuse University	http://ericir.syr.edu
Training and Development	Penn State University	trdev-l@psuvm.psu.edu
National Institute for Literacy	Federal Department of Education	http://novel.nifl.gov
Tennessee Division Adult and Community Education	State Department of Education	http://www.state.tn.us/education/aeintro.htm
Center for Literacy Studies	University of Tennessee	http://www.coe.utk.edu/literacy/
Internet Resources for Adult Educators	Kevin Green, Pelavin Research Institute	
Workplace Literacy: A Guide to the Literature and Resources	S. Imel & S. Kerka	ERIC Information series No. 352 (see above)
O*Net (Occupational Information Network)	U.S. Department of Labor	http://www.doleta.gov/programs/onet/
SCANS (Secretary's Commission on Achieving Necessary Skills)	U.S. Department of Labor	http://www.skillsbank.com/scans.html

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Forums and Idea Exchanges

The National Institute for Literacy maintains a workplace forum where practitioners can ask questions from a large audience of other interested practitioners. The Internet provides a way for practitioners in workplace programs to connect to other practitioners who are doing the same type of work. To participate in a forum, a practitioner needs some type of electronic mail.

Computer Assisted Instruction

An undeniable trend in adult education at work is the demand for courses that can be individually delivered on different levels, on different subjects, at a time of the employee's choosing. This has led to an increasing use of computer assisted instructional materials (CAI) in work settings. Advantages in using these materials include: individualized instruction and learning, accurate measurement of progress, time and cost effectiveness for the employer and employee. Many workplaces have installed learning labs. In this learning format, employees are free to visit the lab when they are able to do so. In some larger companies, a teacher is stationed in the lab to provide individual instruction when needed. In Hancock County, The Learning Bus is equipped with CCC Software. "This software starts individuals on their own grade level and lets them progress at their own speed," reported Danny Turnmire from Hancock County.

In a computer lab, have a teacher available to answer questions and to offer help to those in need. The way we were set up, often the employees worked with the computer on their own. I feel like the retention would have been better if a staff member present was present. Judy Warrington, Hardin County

There are disadvantages to computer assisted instruction because in this format there is very little group building, discussion, or practice in communicating. Other disadvantages include the initial cost of the materials, equipment or other technology required for their use. Some CAI is now being delivered using the Internet. SkillsNet, a joint project of TRO Learning and Tennessee Tomorrow, Inc. is an example of computer assisted, Internet-delivered instruction. SkillsNet is presently being tested for effectiveness in workplace educational programs. In the near future there will be more and more CAI resources available by way of Internet.

There is an advantage for a teacher to have a computer and an Internet connection in a workplace setting. Often learners themselves can find the answers they are looking for by using the World Wide Web.

Step 4: Know Your Resources

C. METHODS OF INSTRUCTION/LEARNING

Adult educators have effectively instructed adult participants for decades in many different kinds of learning programs. Many of these methodologies will continue to be effective in workplace learning programs. Classroom instruction is common in many work settings. In a recent study of workforce training programs in one rural Tennessee county, 38% of the 21 workplaces surveyed used classroom instruction at their workplaces[2]. Of this group 29% also had a room dedicated to education and training. There are significant opportunities for adult educators to effectively use proven classroom instruction methodologies in workplace settings. In addition to classroom methodologies, adult educators in workplace settings have identified other methodologies that have enhanced the effectiveness of their programs.

☛ TIP

Plan program thoroughly so problems won't arise later.
Ralph Cochran
Haywood County

People learn in different ways. There are a variety of instruments that give learners an indication to their learning style. Practitioners may find it helpful to use an instrument like the Learning Style Inventory[3] (David A. Kolb, 1981) which evaluates the way a person learns. The inventory identifies four learning types and is based on several theories of thinking and creativity. An instrument based on the same theories of experiential learning is the Learning Styles Questionnaire[4] by Peter Honey and Alan Mumford. This questionnaire comes with a trainer's guide. Another instrument that is helpful in identifying a person's style is the personality assessment instrument, the Myers-Briggs Type Indicator (MBTI). This indicator identifies sixteen personality types and learning styles associated with these types. Results from these instruments give adult learners some pointers about how they learn best and also give the teacher information that is helpful in designing learning activities for a particular group.

The importance of looking beyond traditional classroom methodologies is underscored by the results of the same study cited above. While 38 % of the learning in the 21 workplaces identified in this study occurred in formal classroom settings, over 60% occurred in informal settings involving coaching from other employees and supervisors. Effective adult education at work programs of the future will use a variety of learning methodologies designed to

[2] Davis, Dent. 1997. Employer Survey Report: McNairy County, Nashville, TN: Department of Education, Adult and Community Education.

[3] Kolb, David. Learning Styles Inventory. 1981. McBer & Company, 116 Huntington Ave., Boston, Massachusetts 02116.

[4] Honey, Peter & Mumford, Alan. 1986. Organization Design and Development, 2002 Renaissance Boulevard, Suite 100, King of Prussia, Pennsylvania 19406.

Step 4: Know Your Resources

meet the changing needs of the workplaces they serve. One of the learning methodologies that is becoming increasingly common in adult education at work is experiential learning. Experiential methodologies involve utilizing concrete practical experiences as the basis for learning. In adult basic education this methodology has been popularized through such efforts as those of Rena Soifer at others. [5] Learning from experience can take a variety of forms.

Outdoor Instruction

Experiential learning courses are being used more frequently in today's workplace. They are particularly used in teaching team skills, building group cohesion and motivating learners. Most courses require at least a few hours. Often such opportunities are available through local colleges, scouting organizations, community recreation departments or large companies.

Dwain vanVactor who is a regional consultant with the Tennessee Adult and Community Education Division of the Tennessee State Department of Education, developed and managed the EXCEL program at a middle Tennessee company near Columbia Tennessee. EXCEL was an experiential learning program involving a variety of active learning experiences, including a "ropes" course. Dwain reports: "As a result of participation in these programs, I could see a change in people's motivation and their ability top work together effectively. The course also helped people to learn how to work together to solve problems." Outdoor instruction can be very useful in focusing on interpersonal and team skills as well as a supplement to adult basic skills classes.

Simulation Exercises or Games

Simulation techniques as adult learning methodologies all share the characteristic of assisting the learner to simulate an actual experience for the purpose of reflection and learning. Simulation methodologies come in a variety of forms.

☛ TIP

Make tapes of terms for people to play in their cars.
Mary Elizabeth Faris
Franklin County

Role play is the process of using a dialogue in which participants simulate others in a specific life situation, such as the process of serving in a restaurant. The scenario might be that the class is identifying the components of good customer service. One participant plays the role of the restaurant server and another plays the role of the restaurant patron. These two act out the roles of a simple script. After the role play, the two reflect on their experience and identify the components of customer service and its applications for "real life." Role play experiences are also very useful in reinforcing basic skills such as speaking, vocabulary, reading and interpersonal skills. A variation of a role play is a "fish bowl" where a role play is done in the middle of a group who

[5] Soifer, R., Young, M. E., Crumrine, B.M., Honzaki, E., Simmons, B. K., & Young, D.L., (1990. *The Complete Theory to Practice Handbook of Adult Literacy: Curriculum Design and Teaching Approaches.* New York: Teachers College Press.

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observe what is said and done—like watching a fish bowl. This allows for a large group to be a part of the learning experience. Fish bowls are often used as a part of classroom learning experiences.

Games can be a very effective experiential learning method. Because of their "playful" nature, games increase involvement and motivation. The experience of the game is also a very useful context for learning and reinforcing adult basic skills. Games can take different forms as well. One example of an instructional method involved the use of a crossword puzzle focused on health and safety vocabulary for a manufacturing plant.

☛ TIP

Use colored cereals to teach mean, median, and mode.
Jenny Parris
Anderson County

A computer game such as "Sim City" allows for individuals to practice basic skills in reading and math in an environment requiring careful planning and decision making. Games can also provide feedback to participants on the consequences of their decisions. Other more complex games such as "The Company Game"[6] actually simulate the experience of employees in a manufacturing company. Such games reinforce basic skills in a close to real life situation without the consequences that often accompany bad decisions. The key component of activities such as games is the reflective period after the activity.

English for Speakers of Other Languages

In workplace settings English for speakers of other languages presents a special challenge. With the increasing demands for higher reading levels in a changing business environment the instruction of speakers of other languages is challenging. Learning language in a school setting is very different from using language in a work setting. Retrieving or remembering information for an exam question is different from using information to solve a problem under the pressures of a high production environment. Experiential learning methodologies are very useful in strengthening learning effectiveness for speakers of other languages.

Facilities

Workplaces have a variety of facilities for education and training. In a manufacturing plant in middle Tennessee, a proposal was made to set up a basic skills course for the employees. Management was interested in the course, but there was not one meeting room in the plant that accommodated more than three people. The employees partitioned off a corner of a storeroom to make a training area. They installed lights and a whiteboard. Stacks of inventory made the walls of the training area. But employees came to the class. While the environment was not ideal, in some ways it suited the culture of this particular workplace. The employees seemed comfortable in the area and they interacted and learned.

[6] Davis, Dent & Ziegler, Mary. The Company Game ©1994.

Step 4: Know Your Resources

Larger companies might have more formal rooms designated for training and education along with equipment such as overhead projectors and flip charts. Learning can happen in a variety of contexts. The most important factor to consider is space that is adequate, well lit with and quiet in which the learners are comfortable. One factory in West Tennessee placed a trailer outside the plant. The trailer had a small computer lab, a room partitioned with tables and chairs, administrative file area, and a small meeting room. A group of self-directed learners could be using the computers while another group of learners could work with a teacher.

In some companies, where space is extremely limited, it may be difficult to set up the ideal space for adult learning. Often it is up to the educator to be an advocate for adequate space for a training and education room. In a large company in East Tennessee, there was a very nice training room that was assigned to the basic skills teacher for certain periods every week. However, when space was needed for an emergency meeting, management would use the room during the time the basic skills classes were scheduled. After this happened a few times, the teacher went confidently to management with a copy of the letter of agreement which said the company would provide a training room. All it took was a friendly reminder, and management found another meeting place.

☛ TIP

Have convenient scheduling of classes for employees. Give incentives for coming. Have a good, comfortable setting with adequate facilities.
Melody Skelton
Hickman County

In addition to meeting space, it is helpful if the teacher can have adequate storage space so the materials do not have to be transported each time there is a class. A space in the company for a locked file cabinet is also valuable for employees' records.

Conclusion

Whatever adult education resources are selected for inclusion in a particular program, it is important to document what was used, how it was used and what happened as a result of using the resource. This way, the learning is captured and can be used in the next workplace program. In a world where available information is exploding, it is helpful to devise a system for cataloging resources for future use.

Adult education at work is a continual learning process. By keeping a record of the courses, lessons, methodologies, and materials used, and their effectiveness, it is possible to build a library of resources for workplace programs. Computerized databases like Microsoft's Access or Excel are effective ways to store this type of information so it can be retrieved for future use. Ideally this should be done using the computer since the search feature of major software programs will allow for easy and quick access to this data.

Notes

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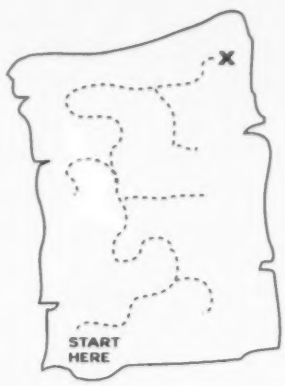
Wishing consumes as much energy as planning.
—Anonymous

A successful proposal will result in a signed letter of agreement between the employer and the adult education organization. Crafting a proposal and completing a letter of agreement can be a challenging effort, especially when working with a large organization or when program goals are especially complex.



Completing a program proposal and letter of agreement builds on the previous steps of adult education at work. With the knowledge of your program, your community, the specific employer's needs, and the resources available, you are in a position to complete an effective plan. The letter of agreement summarizes the plan and is a commitment of all parties to complete the effort.

In "Step 3: Know Your Workplace," the adult basic education needs of the employer were identified along with the unique culture of the workplace. This step included a statement of adult education goals for the specific workplace, a meeting with top management, and a preliminary agreement by all parties to proceed. The exact nature of this preliminary agreement will vary in each situation. Some will be very informal, especially in small businesses. Whether the preliminary agreement is formal or informal, it means that the adult education professional can complete the details of a proposal with the understanding that the project will be approved if the proposal is satisfactory. Since the details of most projects can be negotiated, this informal agreement indicates that there is a high probability of implementing the project, even if the form changes as details are negotiated. With this sort of informal agreement, an adult education professional can afford to spend time developing a proposal and negotiating the letter of agreement.

This step will result in completing a formal program plan for adult education at work.

A. PRINCIPLES OF PLANNING

The process of developing an adult education program plan for a worksite is based on four principles:

- Innovation
- Learning
- Informed choice
- Collaboration

Step 5: Know Your Plan

Innovation

With the rapid changes in today's workplace environment, innovation is critical in successful adult learning programs. Degrees of innovation will vary depending on each situation. The goals of two learning programs might be very similar, for example, "to help five employees obtain their GED." The goals may be similar, but the specific context of the two organizations will be very different. Each will have a different culture, different work processes, products, a different style of leadership, different levels of skill among employees, and different levels of knowledge and experience. Because of these differences, innovative adult education professionals are developing programs to meet the needs of a particular workplace. The process outlined in this Handbook suggests methods and resources that will help in program innovation.

Learning

Learning is a part of the planning process. Educators in the workplace have learned not to make assumptions or assume that they have the answers before they have asked the questions. The planning process is a learning process, a process of discovery. Successful workplace programs depend on a plan that grows out of what is learned about a particular workplace—its managers and employees, the learning needs, and available resources. Adult educators in workplace settings are always observing, listening, and reflecting. They are on the lookout noting what is happening, changing, working and not working.

Informed Choice

Informed choice is a term first popularized by Chris Argyris, a Harvard professor in management studies. Informed choice means that a person has adequate information and makes a choice based on that information. Writing a proposal provides a mechanism for all concerned to make an informed choice. Managers, supervisors, front line workers, human resource personnel may have contributions to make to the proposal. The proposal will contain information about the services to be provided and will outline the expectations for each partner. Informed choice always leads to a positive outcome, even if the program itself is never undertaken. Choices made without adequate information or adequate time to decide often lead to misunderstandings and poor outcomes.

Collaboration

In a school setting, most classroom teachers function independently. Sometimes teachers within a particular program will cooperate with each other and share resources, but forming partnerships is rare in most educational settings. Often the pressures of time and the demands of a classroom setting preclude a lot of interaction. The growing interest in workforce devel-

☛ TIP

Be flexible. You may need to develop study helps on short notice or maintain a variable schedule or tutor in a subject you haven't had in 20 years. The workplace is constantly changing, and workplace educators must be constantly adapting.
Heather Nicely
Kingsport, Tennessee

Partnerships increase opportunities..."Perry County Schools ABE Program and the Linden Unit of the Tennessee National Guard are providing a testing and training site at the National Guard Armory for interested adults. The purpose of the cooperative agreement is to assist people in preparing for the GED test and improve basic skills in math and writing."

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opment is increasing the interest in using collaboration when planning new programs. Collaboration involves sharing resources for a common goal. In some communities, ABE programs are collaborating with other service providers to deliver a new program or an existing program in a new way. Sometimes managers, union representatives and employees will collaborate with educators in developing a new learning program. Collaboration takes time but can be a very effective way to leverage resources. Collaboration leads to the following:

- Builds on what others have done and are doing
- Shares the risk and investment of a new program
- Increases the resources available to each one
- Involves others who are doing similar things in accomplishing common goals
- Gives credit to others

In developing adult learning programs in work settings, collaborating can significantly increase program effectiveness.

Workplace Education Team

Many adult educators have collaborated with employees, managers, union officials, supervisors, human resource directors and employees in developing learning programs that have been very successful. Several adult educators reported that they used Workplace Education Teams are found them to be very helpful. Workplace Education Teams assist the adult educator in planning the program, promoting the program within the company, helping to tie the basic skills instruction to real life work situations in the company, and assisting in the assessment and evaluation process. Workplace Education Teams provide support to the educator and members work toward the program's success. A group who collaborates successfully will do the following:

- Have a clear agreed upon purpose
- Define carefully roles and procedures
- Keep written records of its work together
- Serve as a bridge between the adult educator and management, labor, and employees
- Keep employees informed about the program
- Assist instructor to overcome roadblocks

The group can be called by any name. Workplace Education Team is a common name. In some companies such groups are called training teams. The name is not important. What is important is to have a group representing key stakeholders with a common understanding of their purpose who are committed to work together to accomplish that purpose. Workplace Education Teams

"The Jackson County Adult Basic Education program does special projects for the Tennessee State Departments of Education, Labor, Human Services.... All projects are carefully discussed, negotiated and verbally and field tested. The "buyer" finally writes the contract arrangement which is sometimes amended half-way through the year. For nine years, this arrangement has worked very well.

—Carl Anderson
Jackson County

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are more common in larger companies or more extensive learning programs. Often in smaller companies such committees will be very informal, but can be equally effective.

Action Plan

At meetings, group members often say they will perform some task, like follow-up on a question, but often the task remains undone. An action plan is a way to avoid this problem. An action plan says clearly what needs to be done, who is responsible, and by when will it be done. Many groups write their action plans on a piece of flip chart paper so the entire group can see the plan. After the meeting, one person agrees to transcribe and distribute the action plans so that everyone involved can remember what is going to be done when and by whom.

A collaborative Workplace Education Team is only formed with the blessing and input of management and with the involvement of appropriate company personnel. Often the Human Resources staff at the company will be instrumental in guiding the formation of such a group.

Use an Action Plan for Effectiveness

ACTIVITY

ACTION PLAN

Item No.	What?	Who is responsible?	By when?	Comments
1.				
2.				
3.				

☛ TIP

A good way to keep a record of the work agreed to by the collaborative group is through the use of an Action Plan.

B.DEVELOPING A PROPOSAL

A proposal is the first step in developing a letter of agreement to do an adult learning program in a work setting. The need for a program proposals varies depending on the situation. Effective proposals can vary from a page or so to over twenty pages. Most will usually be 3-5 pages. Length will depend on the content of the proposal. Educators can ask the company representative what kind of proposal would be useful and receive very helpful guidance. The more costly or complex the work to be completed, the greater the need for a proposal. Often the company representative gets approval from others in the organization. The proposal helps others who have not been a part of the initial discussions understand the specifics of the program. Successful program proposals in a business setting are concise, clear and results oriented. The more specific the outcomes, timing, and costs the more supportive an employer is likely to be.

Although particular proposals for adult education at work will vary, generally they will contain these common elements:

- Executive summary (a short summary of the proposal as a whole)
- Goals, objectives and outcomes (what you plan to do and the results you expect)
- Scope of work (how you plan to accomplish your goals and objectives)
- Time line (when is the work going to be done)
- Measurements (how will you know you have achieved the outcomes)
- Resources needed (what resources will it take to get the work done)
- Costs and revenues (what will the project budget look like)
- Incentives (what incentives, if any, will the employees receive for participation)
- Confidentiality (who will have access to individual employee data such as test scores)

A Proposal Plan

ACTIVITY

Form your work group: Form your work group (or team if appropriate). The size and nature of this group will vary. Sometimes the adult education professional will work alone. Sometimes a collaborative working group develops the proposal. Such a group could include the ABE Program Manager, instructor(s), Workplace Education Team, management, union representative, etc. Try not to let the group get so large that decision making will be difficult. Eight to twelve people is a good size.

Review the goals: Review the goals you identified as a result of the work you did in "Know Your Workplace" for clarity.

An example of a goal:
To increase the basic math skills of the employees in the XYZ Company so there is a 15% reduction in measurement error in the production line.

Identify outcomes: Identify desired outcomes for participants and program. Based on the goals that have been identified, list the specific results you want to see happen in the workplace by the conclusion of the learning program. These are the outcomes. Generally they should be measurable and limited in number.

An example of an outcome:
An outcome for this goal would be a 15% reduction in measurement error among those employees who utilize measurement skills in their work at the conclusion of training.

Identify Objectives: Identify objectives needed to accomplish your goals and outcomes. The example of an objective outlined below is a single objective. A

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proposal for an adult education learning program designed to accomplish the outcome in this example will include several objectives. There may be courses in three different departments, an assessment process for all the employees of the company, or the development of customized materials (especially in larger companies). This example addresses a single objective that will contribute to the accomplishment of the overall goal and outcome.

Objective:

"Determine a baseline for measurement error in the plant, identify the employees who use measurement skills, hold a ten week course for these employees on measurement skills and evaluate by administering a pre-test and a post-test to calculate learning gains. At the conclusion of the ten week adult education learning program at least 70% of the employees who use a tape measure in their work improve their scores in measurement using a tape measure by at least 25%."

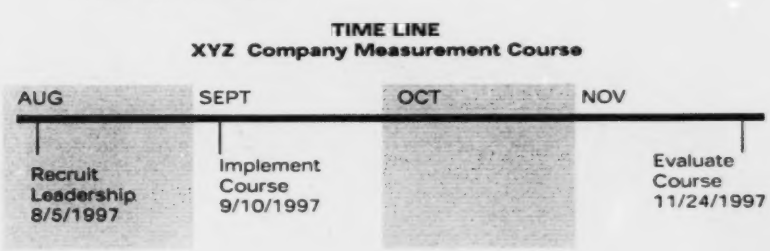
Identify Action Steps: Working with the Workplace Education Team, use flip chart paper to identify the action steps necessary to complete each objective. Put the name of the responsible person next to each item and the date of expected completion.

Examples of Action Steps:

- Identify the employees in the cutting department who use a tape measure.
- Recruit a small group of employees and supervisors to help design and teach the class.
- Design the class, including a pre and post test. Secure an instructor and materials.
- Set dates and times.
- Recruit participants.
- Administer pre test
- Implement class
- Administer post test

Establish a timeline: Establish a time-line in a scope of work outlining the key steps necessary to accomplish the goals and outcomes and the time required for completion. The scope of work details what you plan to do, how and when you will do it. It can simply be an outline that summarizes key action items and objectives designed to achieve the outcomes that will accomplish your agreed upon goal.

A Sample Time Line:



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Describe the measurements: Describe the measurements you will use before, during, and after the program to determine progress toward your goals and achievement of the program outcomes. In this example the primary measurement is the calculated difference between participants' pre- and post-test. An outcome measurement might be measuring the changes in measurement error after the completion of the course. Measurement and evaluation is covered in detail in "Step 6 - Know Your Progress" and "Step 7 - Know Your Results."

Identify resources: Identify resources needed to complete the scope of work (see "Know Your Resources"). Resources are contributed by the educational provider and the employer. The educational provider might provide such items as time for setting up the program, assessment, instruction materials, and evaluation. Resources contributed by the employer might include such items as meeting space, tables and chairs, file cabinets, telephone, use of office equipment, storage closets, and incentives for employees. In addition, for the sample goal of increasing the basic math skills of the XYZ Company, other resources will be needed such as curriculum on basic math skills and measurement, a company manual, and the skills and expertise of selected employees and supervisors who have mastered the skills involved. Heather Nicely, describing a workplace program, said, "All materials (except teacher prepared ones) have been employer supplied. However, most of the materials have been teacher chosen. Exceptions would be: training materials used for specific employee training in which students have required remedial assistance, manuals written for specific job skills where testing or written content is required; and courses designed as prerequisites for particular jobs."

Develop a budget: Develop a budget that summarizes the costs and revenues (if any) from the program in a brief financial statement. For example, the costs of the course might be $480. The budget suggests company support in the amount of $300 or approximately $15 per participant. A real bargain for a ten week course!! A complete proposal would include the costs and revenues for all the courses and activities involved in the learning program as well as the value of the contributions of both the educational provider and the employer.

List incentives: Include a list of incentives employers can consider giving employees for their participation. Effective incentives for employee participation can be quite varied. Monetary rewards and work release time are often effective. In middle Tennessee, an employer offered a half hour release time to employees if they would offer fifteen minutes of their lunch time. Since the employees only had a half hour for lunch, they asked the teacher if they could bring their lunches to class and meet for a full hour. The teacher was pleased

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at their interest and the class became a regular lunchtime event.

Examples of employer incentives include:

- Providing books, materials and instructor
- Keeping a record of employee participation as a part of the employee' s permanent file and using this information when considering promotions, job changes and further training
- Recognizing participating employees in the company newsletter, at a luncheon or other ways
- Providing release time for participation in adult learning programs
- Reimbursement of GED testing fee
- Release time to take the GED test
- Providing meals
- A monetary reward for obtaining a GED

Many adult education programs offer small incentives such as T-shirts, books, fast food restaurant coupons, and coffee mugs. These can be especially useful when a participant advances within a learning program. Many programs celebrate a participant's achievement of obtaining a GED, some with a banquet or certificate. All these incentives can be very useful in encouraging involvement.

While incentives are an important factor in encouraging involvement, many adults have an internal incentive because they want to learn and improve their knowledge and skills. This internal incentive may be stronger than the external ones, however, it is often hidden or perhaps not even clear to the adult learners themselves.

Respect confidentiality: Include a statement on confidentiality regarding employee assessment and evaluation scores as appropriate. See the Sample Statement of Confidentiality at the end of this chapter.

Complete the executive summary: The executive summary gives an overview of the proposal and briefly lists the main points. On a one page proposal, a summary is not necessary. On longer proposals it is helpful for the proposal reader. The summary briefly overviews: goals, outcomes, objectives, plan, costs and benefits for employer, employees and other stakeholders.

Successful Proposals

Successful proposals are easy to read, with an appropriate format. In some cases the chief executive will simply read the proposal and sign the letter of agreement. Sometimes employers may need to communicate with other stakeholders off-site. Some employers may want to schedule a meeting for a presentation to a management team and answer questions. Multiple copies of the proposal make it easier to review it in a meeting setting. Overhead slides can be effectively used in making a presentation to a larger group.

C. EMPLOYERS' QUESTIONS

Employers may ask questions. While some employers are interested in providing educational opportunities that will benefit the employee, many employers want to know how the educational program is going to benefit the company. The questions and answers below are a sample of the questions employers might ask and the answers that adult education professionals might give.

How can you tie the adult education program to our new quality initiative?
When we took the plant tour, we noticed employees were keeping statistical process charts. The supervisors suggested that there is a need for pre-statistics and statistics course for the individuals who are new to quality control. Several new employees confirmed this. If we offer a pre-statistics course, the participants could use the completion certificate in the continuous learning program in the plant.

This answer demonstrates a knowledge about the company, the programs (continuous learning program) underway in the company, and a knowledge about the potential needs of the employees.

How will you ensure the highest quality instructor?
Our program has a reputation in the community for hiring only committed, highly trained instructors. These individuals are able to apply adult learning principles to instructional design and delivery and this makes them very effective. Instructors are monitored regularly so assistance can be given when needed.

This answer demonstrates that the program has a reputation for quality and emphasizes the unique skills adult educators have to plan learning programs for adults.

How will you customize a program to meet our employee needs?
We tailor training to build on an individual' s present knowledge and needs for skill development. We assess a person's skill level in a variety of ways. An instructional plan assures that the participant's goals will be met. Learning methods are appropriate for each participant. We show each person how to use their new skills on the shop floor.

This answer demonstrates the knowledge that adult educators have in using assessments and in planning educational programs. Most adult education professionals have a wealth of knowledge about the ways people learn that is uncommon in an organizational setting.

☛ **TIP**

When meeting with company officials, be brief as possible, very specific, and know everything!
Sarah Campbell
Marshall County

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How will you develop a program that reflects this workplace and its requirements?

We work with an Workplace Education Team so the educational programs accurately address the needs of the company. Since your company is adopting new, "high performance" work practices, the educational programs will help broaden employees' knowledge and skills. The Workplace Education Team agreed there is a need for team skills for the new front line teams. These skills will be reinforced in the basic skills courses.

This answer demonstrates that an Workplace Education Team with company representatives will help assure that the educational program reflects the workplace and its requirements. The answer also suggests that the adult education professional is very familiar with the needs of the workplace.

Helpful Forms for Developing a Program Proposal

FORM

Action Plan

Program Goal [from *Know Your Workplace*]

Objective:	Action Item:	Person Responsible:	Beginning Date:	Completion Date:	Notes:
1. [Key steps to accomplish Goal]	a. [Key steps to accomplish objective]				
	b.				
	c.				
2.	a.				
	b.				
	c.				

FORM

Budget Summary Form

Revenue	Category	Amount	Totals
	Adult Education Agency Support		
	Program Fees		
	Employer Support		
		Total Revenues	
Expenses	Assessment Materials		
	Instructor Costs		
	Instruction Materials		
	Facility (Room, furnishings, etc.		
	Evaluation		
		Total Expenses	
		Balance of Revenue and Expense	
Cost to Adult Education Program			
Cost To Employer			

Sample Statement of Confidentiality

FORM

Confidentiality Form

Adult Education at Work is committed to respect the confidentiality of its participants. By signing this form, the instructor, company, union and adult education coordinator agree to the following confidentiality provisions:

1. Individual employee educational assessment scores will be reported only to the individual employee. They are not to be shared or discussed with anyone else in the company or union.
2. Individual assessment scores will not be shared with anyone outside the company, except to officials in the educational agency, and then only for compilation in order to measure overall program performance.
3. No assessment scores will be shared or discussed with anyone without the permission of the employee, the Company CEO or manager, and the adult education coordinator.
4. All assessment scores will be stored in a secure place. Only the instructor and the adult education coordinator will have access to the scores.

Signed:

_____	_____	_____
Company CEO or Manager	Adult Education Coordinator	Adult Education Instructor
Date: _____	Date: _____	Date: _____

Letter of Agreement

Many adult educators who responded to the survey emphasized the importance of a formal letter of agreement outlining the responsibilities of the adult education program and the employer. The letter of agreement addresses items that are of common interest to the project stakeholders. Included in most frequently in letters of agreement are the following:

- Company expectations and goals
- Program details such as the number of classes, times to be held, duration, subject matter, curriculum and other resources
- Program costs and methods for determining costs
- Instructor standards, criteria and process for selection, evaluation, etc.
- Monitoring requirements, methods and intervals for reporting, evaluation process, time table and responsibility.

This letter can take many forms, but should be signed by all parties before any program is initiated. The following is a sample letter of agreement.

RESOURCE

Sample Letter of Agreement

Date:

To: Adult Education Coordinator
Adult Education Program
Address

From: Manager
Company
Address

Subject: Partnership Agreement for Adult Education at Work

Duration of agreement: From: [date] to [date]

Goals of Adult Education program:

Adult Education Agency will provide:
1.
2.
3.
4.

Company will provide:
1.
2.
3.
4.

Other provisions of agreement:

Renewal: Both company and adult education program agree to review this agreement on or before [date] and to mutually agree to extend, modify or terminate its provisions.

_____	_____
Company CEO or Manager	Adult Education Coordinator
Date: _____	Date: _____

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Partnership Policy Statements

Some adult education programs utilize a more generic statement outlining the employer responsibilities and the adult educator' s possible educational offerings, commitments and additional program possibilities. An example of such a statement is from Sue Underwood in Henry County:

RESOURCE

The Henry County Adult Learning Program

Becoming Your Educational Partner

The Part Each Must Do

The Company's Responsibility:

1. Decide to establish a Workplace Basic skills Program and determine the approach.
2. Choose one or more "Educational Partner(s)."
3. Plan with your educational partner(s).
4. Provide the necessary resources.
5. Monitor the program by making reports and keeping the appropriate records both for you and for your educational partner.
6. Evaluate the program in cooperation with your educational partner(s).

The Henry County Adult Learning Program

1. Participate in planning the instructional approaches. We can assist with all three Adult Basic Educational levels. We can also help you establish a program for teaching persons.
2. Assist in making you aware of available resources: curricula materials—human, and financial.
3. Assist in determining recruitment methods of volunteer tutors and students. Level I (0-5th grade reading level) instruction is best done one-on-one with tutors; higher level instruction can be done in classes. We can also assist certified teachers in choosing good curriculum.
4. Provide tutor training for volunteers. We are very happy to train any volunteer tutors, you may recruit either from employees, their families, of the general public. We provide quality training by certified trainers. Our basic training workshop is four hours. It my be done at your worksite or in a location we choose.
5. Include your tutors in our in-service training sessions to keep your tutors updated on new methods and materials,
6. Advise you on making appropriate tutor-student matches. Usually a tutor-student team gets together twice a week for an hour to an hour and one-half sessions.
7. Assist you in monitoring instructional progress. This is probably the most critical part of the program. A poor tutor-student match or a tutor or student who fails to follow through can destroy the relationship.
8. Advise you on record-keeping and reporting procedures.

The above list tells what we can do in an on-site program. Please know that our Center stands ready to serve your employees as students in our regular program just as we do any student who seeks our ser-

vices. There is no charge for our services including instructional materials. The difference is that the regular program would not likely include workplace basic skills needs (vocabulary, job manuals, forms, etc.). If, therefore, establishing a workplace program is not feasible for you at present, please refer employees to our program. If fact, we would be happy to set up a recruitment table at your company to inform employees of our services.

We at the Henry County Adult Learning Center wish you a successful journey into your Workplace Basic Skills Program.

Partnership Policy Statements are useful when the nature of the adult education program at the workplace does not change appreciably from workplace to workplace. In this case, the educator and employer would simply sign a letter that would reference specific items on the policy statement.

Next Steps

The completed letter of agreement summarizes the plan for the adult learning program. Implementation is the process of following the steps in the plan. The more extensive and collaborative the planning process has been, the easier the process of implementation. As the learning program is implemented, it is important to monitor the progress of the plan and report to stakeholders. This leads to the next step in the process of *Adult Education at Work:* "Know Your Progress."

Notes

Step 6: Know Your Progress

Improve constantly and forever the system of production and service. Improvement is not a one time effort. Management is obligated to continually look for ways to reduce waste and improve quality[1].

—W. Edwards Deming

Evaluation is addressed in two sections of the Handbook; "Step 5 – Know Your Progress" and "Step 6 – Know Your Results." Evaluation is the process of determining what results a program has accomplished. An evaluation is a form of measurement that answers the question, "Did we achieve our goals and outcomes?" Evaluation often happens at the end of the learning program. This type of evaluation is discussed in "Step 6 – Know Your Results." Some practitioners also conduct an evaluation during the program. Evaluation that takes place **during** a program gives valuable information that can be used to improve the program. This way the goals and outcomes are more likely to be achieved. This is the type of evaluation, addressed in "Step 6 – Know Your Results," that asks the question, "Are we making steady progress toward our goals?"

When implementing an adult education program at a workplace, it is very helpful to measure progress along the way. In research terminology this process is called formative evaluation. A formative evaluation gives the instructor or program manager valuable information to "form" the program by making appropriate changes. Another word that is used for measuring progress is program monitoring.

In Total Quality Management (TQM) the formative evaluation process is called "continuous improvement." TQM is popular in many business settings today. And it is also being used more and more by educators and public administrators. The cornerstone of TQM is continuous improvement. Measuring progress at regular intervals (knowing your progress) is the basis

Total Quality management has been defined as: "A cooperative form of doing business that relies on the talents and capabilities of both labor and management to continually improve quality and productivity using teams."

—Joseph R Jablonski

[1]W. Edwards Deming, The Fourteen Points, in M. Walton, *The Deming Management Method*, New York: Putnam Publishing, 1986.

Step 6: Know Your Progress

for improvement. Continuous improvement involves three key activities:

- Measuring the progress of the participant
- Measuring the progress of the program
- Communication

This chapter will focus on ways to measure the progress of the participants and the program along with ways to communicate information about this progress that increases the effectiveness of adult education at work.

Measurement: to ascertain the dimensions, capacity or amount of something; a basis or standard of comparison.

A. MEASUREMENT AND ASSESSMENT

Measurement is the foundation of the improvement and evaluation process. In adult education, measurement includes both assessment and evaluation. Some practitioners use these terms interchangeably. But many practitioners think assessment is the measurement that occurs before an instructional program, and evaluation the measurement that occurs during and after the program. Assessment can take many forms. A common practice for most adult educators is to assess the skills of participants in order to place them in a class situation at the appropriate level.

In a workplace setting, assessment depends on the goals of the education program. For example, if the program is designed to increase measurement accuracy on the shop floor, then an instructor-made assessment tool might be used that is tailored specifically to the type of measurement done on the shop floor. If the goal of the workplace education program is to help participants receive a GED, then a standardized assessment might be appropriate.

Because of a renewed emphasis on workforce development and workplace learning, commercial vendors are developing new assessment instruments that are geared to workplace situations. The most important consideration is to accurately match the assessment to the program's purpose. Goals for workplace programs may be determined solely by the individual or be determined by both the individual and the workplace.

Participant Self Assessment

Participant self assessment is an essential part of the assessment process. Five important questions for any participant to ask as they participate in a learning program are:

- What's my goal?
- What do I already know?
- What do I need to learn in this class?
- How will I learn it?
- When will I know that I have learned it?

Step 6: Know Your Progress

These questions can be addressed by participants in a number of different ways depending on the comfort level of the participants. In some workplaces, instructors meet with participants individually before the program begins to and talk over the answers to the above questions. In other settings, a group of participants may talk over the questions together and then decide individually. The process for answering the questions depends on the specific situation. The important point is that adults frequently know what they need to learn. The educator's job is to help a learner make their goals clear enough so they can monitor their progress. Some educators administer a participant survey as a way to answer the questions for a group as a whole. This is a quick way to identify the interests and needs of individual participants as well as the group as a whole.

☛ TIP

I like to do surveys before the class starts.
Phyllis Bradley
Dickson County

Whatever the form of assessment, it is designed to identify the skill levels of participants in relation to their goals and establish a benchmark for the beginning of the learning process. The difference between the score at the beginning of the learning program and the score on the same instrument at the conclusion of the program provides a measurement of the participant's learning gains or progress in achieving basic skills competency. In addition to pre-post tests, a wide variety of ways to measure competency can be used. For example, measure the degree to which a person can use the skill in a work context.

Adult education instructors keep a confidential file on every program participant. This is an tool for maintaining important records and also for keeping up with other forms of information that could contribute to the participant's ongoing educational success. For example, if a participant writes an essay on his or her vocational goals that essay might be very useful to the educator and the participant in planning future participation in training and education experiences.

A small furniture manufacturer in middle Tennessee set up a workplace basic skills program and initiated an Individual Learning Plan for participants. The plans outlined the participant's goals, the goals the workplace had for the program, the measurement of success, and the strategies the learner would use to achieve success.

Depending on the purpose and goals of the workplace education program, it may be necessary to use some standardized assessment instrument. Great care should be taken in the way assessment "tests" are introduced in a workplace setting in order to assure they are meaningful, to avoid test anxiety and assure confidentiality. There are a variety of assessment instruments that Tennessee practitioners use.

Assessment Instruments

Assessment has traditionally been done using such instruments as the TABE or ABLE. Many adult educators are familiar with these instruments and have a great deal of practice using them in basic skills programs. Today there is a growing variety of instruments for assessment in workplace settings. Two types of assessment are most common. Those that are norm-referenced and those that are criterion-referenced.

Step 6: Know Your Progress

A **norm-referenced assessment** is based on a norm. A norm is established by testing a representative group and then calculating the group's test performance. Test scores of ABE participants are compared to the test scores of the norm group to determine the ABE participant's score. When using a norm referenced test, it is valuable to know if the test is based on a representative group of adults or a representative group of children. A question practitioners ask is, *"Who is the norm group for this assessment?"*

A **criterion-referenced assessment** is a measure of achievement of specific criteria or skills in terms of mastery. The focus is on performance of an individual as measured against a set of standards or criteria rather than the performance of others who take the same test, as with norm referenced tests. Test scores of ABE participants are compared to a set of criteria or standards to determine the score. A question practitioners ask is, *"Who set the criteria or standards for this assessment?"*

Steck-Vaughn Publishing Company has developed Adult Measure of Essential Skills (AMES).

RESOURCE

Adult Measure of Essential Skills[2]

The Adult measure of Essential Skills (AMES) is a battery of assessments designed to measure the necessary workplace and educational basic skills of adults who may or may not have graduated from high school. AMES is a **norm referenced assessment** that focuses on workplace competencies in information, resources, interpersonal, systems and technology. The 1991 SCANS Report[3] outlines basic skills considered essential for work by employers. AMES addresses these SCANS skills:

- **Reading:** the ability to find, comprehend and interpret information in a written document, whether a piece of prose or a manual, graph or schedule;
- **Writing:** the ability to communicate ideas and information clearly in written documents such as letters, reports, manuals or directions;
- **Arithmetic/Mathematics:** the ability to perform basic computations and solve problems using the correct mathematical techniques;
- **Information:** the ability to acquire and evaluate information which is needed, and organize and store information in a systematic fashion; and
- **Resources:** the ability to determine how best to use time, money, materials, references and other resources; design schedules, budgets, etc.

[2] AMES, Adult Measure of Essential Skills is a trademark of the Steck-Vaughn Company. The information in this section is adapted from literature developed by the Steck-Vaughn Company and published by the Riverside Publishing Company, 1997.

[3] United States Department of Labor (1991). What Work Requires of Schools: A Secretary's Commission on Achieving Necessary Skills (SCANS) Report for America 2000. Washington, D.C.: The Secretary's Commission on Achieving Necessary Skills.

Step 6: Know Your Progress

The American College Testing Service has developed a different type of assessment called WorkKeys which examines the competency levels of participants measured against the criteria of subject matter experts. In WorkKeys, both the individual and the job are "assessed." The job is assessed through a job profile done by subject matter experts. Subject matter experts are people who perform a job well at a specific worksite. These individuals decide on the competencies needed for a particular job. These competencies become the criteria of success on that job. The ABE participant score on each competency is compared to the competencies needed for a particular job as determined through the job profile. WorkKeys is a **criterion-referenced assessment** that focuses on workplace competencies. WorkKeys is being used by the Tennessee by the Department of Education and the Tennessee Board of Regents schools.

RESOURCE

WorkKeys

WorkKeys[1] is a national system for teaching and assessing employability skills. It has four essential, interactive components: (1) a systematic process for profiling individual jobs according to the specific skills they require, (2) a variety of tests and assessment procedures for measuring a person's job-related skills, (3) innovative formats for recording and reporting assessment results, and (4) instructional materials and resources directly related to skills that are profiled and assessed.

The system will be especially useful in addressing the needs of high school students who are neither college bound nor in traditional vocational programs, in post-secondary institutions, employer-sponsored training programs, or second-chance training programs such as JTPA. It is designed to ease transitions from one environment to another and help eliminate barriers that discourage individual growth and development.

In addition to reading, writing, and computation skills, WorkKeys will assess such general employability skills as problem solving (critical reasoning); scientific reasoning; organizational effectiveness (leadership); interpersonal, negotiation, and teamwork; motivation and self-development; listening and oral communication; and "ability to learn." It will also help individuals develop needed skills in all of these areas.

When completed, WorkKeys may be used to determine a person's levels of competency in a broad array of skill areas and then match them with the requirements for specific jobs. The system as envisioned will be implemented mainly through state departments of education and state postsecondary education agencies and institutions, as well as in employee training.

American College Testing is developing WorkKeys in cooperation with employers, state education agencies, and the American Association of Community and Junior Colleges.

[1] For information contact: Sherry Child, Consultant, WorkKeys, ACT National Headquarters, P.O. Box 168, Iowa City, IA 52243, (319) 337-1717, Fax: (319) 337-1725.

Step 6: Know Your Progress

☛ TIP

At the conclusion of each class, ask participants for their feedback and suggestions/comments.

Informal Assessment Tools

Participant Journal – A participant journal is an excellent informal assessment of progress. Recording learning, reflections on the class and its applications for the work setting are important tools for improvement. A journal has the advantage of being a first-hand record of the participant's learning experience as well as a way to reinforce the basic skills of reflection and writing. A journal is also a good way for an instructor to monitor the participant's experience in the class. This activity needs to be kept simple at first. Participants get in the habit of reflecting on their experience on a regular basis and writing some of those reflections. There are many effective formats and methods for keeping a journal. Most have these factors in common:

- Some kind of notebook that is easy to carry
- Entries that are dated
- Periodic reflections that are written concerning the participant's experience in the class and at work.

Portfolio Assessment – Portfolios contain samples of the employee's work and are often used to keep a record of what a participant has learned over time. The participant's confidential folder can be a portfolio. The contents can be shared at regular intervals with the participants to show them what they have learned and document their progress.

Reflection – Asking participants what they have learned is a helpful way to document progress. Participants can write what they learn each day in their journal. They can discuss it in class or fill out a daily survey. Instructors usually experiment with different types of informal assessment and evaluation to find the ones that best suit a particular group of learners.

In addition to the assessment measures mentioned here, many computer assisted learning programs also contain tools for learner assessment and evaluation. A key part of the assessing and evaluation process is keeping records.

Participant Progress Records

There are a number of forms that will be useful in measuring progress in an adult learning program. Many published learning programs have forms for recording participant progress. These can be used to record important information for the participant's confidential file. In practice there may be multiple records of participant progress in a learning program. The following is a checklist for participant progress indicators. The items on this list may vary somewhat from program to program, but the checklist provides an easy way for an adult education instructor to identify the items that have been completed.

FORM

Checklist for Completion of Participant Progress Indicators

Checklist for Completion of Participant Progress Indicators	Complete: ✓	Comments:
Initial participant self assessment:		
Participant's goals		
Ongoing student self assessment:		
Final student self assessment:		
Measurement of participant skills achievement:		
Student outcomes:		
Credential:		
Further study:		
Employment:		
Advancement:		

Assessment of an Individual Job

In many workplace education programs, the process of assessment also focuses on the work setting itself. The Job Profile that is a part of WorkKeys identifies the skills needed to perform a specific job. Another method for assessing the skills needed to do the job is the Job Task Analysis or a Literacy Task Analysis. This type of analysis is usually a part the functional context approach to basic skills. The analysis is follows this reasoning:

- Measure the skills required for a particular job
- Measure the skills of a person who will do the job
- Teach to fill in the gap between the skills required and the skills a person has

In recent years, with many workplaces undergoing significant and continuous change, there has been a trend toward a broader kind of assessment. One reason is that in many workplaces, a person's job changes frequently. If job skills are very specific to only one job, the individuals who learn only the skills necessary to do a particular job may need to be retrained if their job changes. A broader assessment may include the more traditional job task analysis, but also may focus on the skills needed by the workplace as a whole.

Step 6: Know Your Progress

The Learning Organization, a concept popularized by Peter Senge in his book *The Fifth Discipline* (1990) attempts to look at the organization as a whole as a learning environment. The chapter of this Handbook, "Know Your Workplace" suggests resources to assist adult educators in the process of identifying the larger context of education and training in the workplace.

Knowing the progress of a participant or a class as a whole depends on multiple factors. Most adult educators rely on more than one form of data when measuring progress in a learning program. For example, most basic skills measurements do not give an adequate measure of participant attitude or motivation. These factors are better measured through self assessment, instructor interviews or observation by other participants. Process measures, such as attendance or participant satisfaction are not adequate by themselves as measurements of class progress, but they are very important. When used along with other progress measures, they are a very useful in assessing progress and making program improvements.

B. PROGRESS OF THE WORKPLACE EDUCATION PROGRAM

On-going Evaluation by Participants

Working Your Plan
↓
Tracking Your Progress

Progress of the workplace program is measured by the participants, the instructor, the ABE Program Supervisor, and the workplace personnel. Each type of measurement is different and done for different reasons. Participants are the customers of the workplace program and their opinion of the program is very important. Workplace programs that are "customer-driven" will regularly assess the quality of the program from the participants' perspective. This can be done by a question, "How is this program going for you?" to a simple survey given to participants at regular intervals asking what participants find most helpful or what they would like to see changed. Some instructors give a daily evaluation asking, "What was most helpful to you today" and "What was least helpful to you today." The focus of this type of evaluation is on the instructor and on the program rather than on the participant. If participants are not satisfied with the learning process designed by the instructor, or if it is not meeting their needs, they will not continue to attend. Testimonials from participants contribute to receiving ongoing support for the program.

On-going Evaluation of the Instructor

Typically, the instructor is evaluated by the ABE Supervisor. When hiring the instructor, the supervisor is clear about how and when the instructor will be evaluated. An evaluation plan can be developed by the instructor and the supervisor. This plan can help the teacher improve instruction and can also validate the effectiveness of the teacher's instruction. Most ABE programs have teacher evaluation processes.

In part, the instructor will be evaluated based on the outcomes achieved by the participants in the program and the progress the program makes toward its goals. This type of evaluation is results-based. For example, the teacher may be evaluated based on the number of participants who reached their goals or the number of participants who attend class regularly. The ABE Supervisor, as coach, can meet with the teacher to review the program plan and talk through any difficulties the teacher may be having. This type of informal evaluation is very useful and can help the supervisor and teacher determine if there is a good match between the teacher and the workplace. Supervisors will also want to know if the teacher has a good rapport with the employees and other stakeholders in the basic skills program.

In addition to the supervisor's evaluation, the instructor should also do a self-assessment and evaluation, similar to the one done by the participants. Many teachers have had little experience in workplace settings and may want to have their own learning plan or staff development plan for increasing their knowledge and skills. The instructor may want to ask the Workplace Education Team to participate in informal evaluation of the teacher and the program to give feedback and offer suggestions. The team can work out the most appropriate ways for this to occur. Instructor evaluation leads to program improvement.

On-going Evaluation of the Program

Measuring the progress of a learning program toward its goals is based on the following:

- Working through the program plan
- Keeping a record of the data associated with the learning program and its participants
- Communicating that information to appropriate stakeholders
- Getting feedback from appropriate stakeholders

The original program proposal and letter of agreement with the employer will specify the agreed goals and outcomes for the learning program, as well as the measures for those goals and outcomes. Making a checklist and transferring the appropriate due dates and actions to the calendar is a good step toward a successful measurement of progress and program improvement.

Step 6: Know Your Progress

☛ TIP

Keep a log of what actually happened in class on the back of the lesson plan. This becomes a record of what happened in class.

Feedback is the process of sharing information with another person for the purpose of improvement. To be helpful, feed back should:

- **Be based on measured data**
- **Be specific**
- **Be descriptive not judging**
- **Be checked out for accuracy and appropriateness through asking questions and listening**

Instructor Records

Complete and accurate records are an indicator of a quality program. Instructors keep a variety of class records. Attendance, results of activities or tests, and lesson plans are among important records. Records need to be kept so that information can be easily retrieved for answering questions from employees or from employers.

Lesson plans record the instructor's plan for a class session. To the extent that they are followed they are actually a record of the class learning activities and become very valuable for future class planning. Noting changes on the lesson plan becomes a record of the changes in the plan and the class experience.

Workplace Education Team and Ongoing Evaluation

The Workplace Education Team is an excellent resource for ongoing evaluation. This group may want to establish an evaluation process so that there is regular feedback and information exchanged between the instructor, the employer, and the ABE Supervisor. Tennessee practitioners who teach in workplace settings say it is extremely important to get regular feedback from all stakeholders. Regular feedback from stakeholders interested in the program help teachers feel confident that they are being as effective as they can be.

C. COMMUNICATION

In order to know your progress, measurement is critical. But without communication, measurement is a dry academic exercise. Communication makes measurement useful for improvement. Periodic stakeholder reporting is a critical part of knowing your progress. In communicating appropriate program data to stakeholders it is important to identify the stakeholders of the program and the data appropriate for each. In some workplace settings there may not be a representative of organized labor. In a particular company it may be important to communicate with supervisors and management as well as the Human Resource staff member. Some CEO's are very interested in program progress, others are not. Some of the data available to the instructor is confidential, such as assessment scores for individual participants, and should not be communicated to other stakeholders. Some data can be communicated with the permission of those involved, such as an anecdotal class experience. Still other data, such as total class aggregate measures of learning, are not considered confidential.

Step 6: Know Your Progress

The Workplace Education Team can be helpful in identifying the stakeholders, the type of information each stakeholder needs, and the best timing for communication. A simple table can be developed that will remind the instructor to communicate with program stakeholders. The following is an example of such a form:

FORM

XYZ Program Progress Communication Form

Date	Stakeholder	Address	Phone	Information	Comments
9/18	Participant	12 Any Street	225-9876	Assessment feedback	Telephone call—Scores on TABE
10/14	Human Resource Manager	XYZ Company	225-0077	Aggregate assessment scores for class	Send assessment memo
10/21	Supervisor	XYZ Company, Plant B	225-0541	Participant received a GED	Send memo

Explaining the assessment and evaluation process to the employer is important. Most employers do not have an educational background. Educators must be prepared to explain the strengths and limitations of any assessment or evaluation measure. This explanation is most useful when it is very concise and directly applied to the goals of the program. Handouts prepared by the publisher supplemented with a brief, half page summary of the specific application will usually be effective in communicating this information. Explaining the limitations of any kind of standardized assessment is important so results alone are not used to make decisions.

To communicate...means to share information, thoughts, and feelings by talking, listening and writing *so another person knows what you mean.*

Report forms must be appropriate to the situation. Educators can create their own reporting process for each workplace setting. It may be helpful to develop several forms that can be used in multiple settings to reduce paperwork. The following is a sample memorandum that can be used in communicating assessment data to an employer:

RESOURCE

Sample Memorandum

DATE:

TO:

FROM:

SUBJECT: XYZ Basic Skills Class Assessment Results

On [date] the twenty participants in the XYZ Basic Skills Class took the _____ Assessment on reading for comprehension. This assessment was developed by... and measures... and is useful for.... It has been used in _____ workplaces and is considered an accurate measure of....

The specific measure used in this assessment is.... Of the twenty class participants ____% scored below _____ level, ____% at a level between ____ and ____, and ___% scored higher than _____ level.

This result is significantly higher than the results of the last three classes we have held at the XYZ Company and compares favorably with the national average for _____ employees.

Because of this assessment we are going to use the _____ curriculum which has proven very effective with other groups at a similar level of competency.

Please let me know if you have any questions. I will report on the group's progress using this curriculum in six weeks as per our agreement.

☛ TIP

It is really important that ongoing assessment and evaluation of the program should take place and communication be kept open.

Diane Parvin
Cumberland County

D. PROGRAM MANAGEMENT

Effective program management includes many different skills and activities. There are different styles of management and approaches to problem solving. Common to every form of effective management is a process of effective measurement and communication. Measurement is what allows for timely, accurate feedback. Communication is the process of sharing that information with stakeholders so it can be used to improve program effectiveness.

In program management, problems often occur when important data is not measured or when data is not effectively communicated. In order to measure data, whether the data is class attendance, learning gains or instructor perfor-

Step 6: Know Your Progress

mance, systematic observation and record keeping are critical. Systematic observation and record keeping have been a part of effective class management for a long time. These same practices are important in workplace settings.

What is equally important is communication. Communication in this sense is the process of providing systematic feedback to program stakeholders. In most workplace learning programs, there are multiple stakeholders. Besides the participants or learners, there are supervisors, other employees, managers, union representatives, and other employees. Providing appropriate feedback to diverse program stakeholders in a timely and accurate way is one of the challenges of a successful adult education program at work.

Feedback can take different forms. It can be formal, through reporting, or informal, through conversation. It can be written, as in the form of a memorandum. Feedback can make use of graphics such as a pie chart or graph of progress in the course. Written communication is very important, since it provides a long term record of the progress. It is also important make opportunities for conversation. Different stakeholders interpret information in different ways. It is the conversation that establishes the meaning and importance of the program information.

As a common meaning is established, areas for improvement will become clear. If those involved in the management of the learning program use effective measurement as well as adequate communication, there will be widespread stakeholder commitment to make the necessary improvements.

CONCLUSION

Knowing your progress is a function of measurement and communication. Effective and timely measurement and stakeholder feedback are cornerstones of good program management and improvement. Information can be gathered as the class progresses, allowing for change and improvement. Ongoing evaluation is important. It is equally important to gather data and provide feedback at the conclusion of the learning program, to know the results of the program. This is the focus of Step Seven of *Adult Education at Work*.

Step 6: Know Your Progress

RESOURCE

A Glossary of Measurement Terms, ERIC Digest[5]

Achievement Test – and objective examination that measures educationally relevant skills or knowledge about such subjects as reading, spelling, or mathematics.

Average – a statistic that indicates the central tendency or most typical score of a group of scores. Most often average refers to the sum of a set of scores divided by the number of scores in the set.

Battery – a group of carefully selected tests that are administered to a given population, the results of which are of value individually, in combination, and totally.

Criterion-Referenced Test – a measurement of achievement of specific criteria or skills in terms of absolute levels of mastery. The focus is on performance of an individual as measured against a standard of criteria rather than against performance of others who take the same test, as with norm-referenced tests.

Diagnostic Test – an intensive, in-depth evaluation process with a relatively detailed and narrow coverage of a specific area. The purpose of this test is to determine the specific learning needs of individual students and to be able to meet those needs through regular or remedial classroom instruction.

Grade Equivalent – the estimated grade level that corresponds to a give score.

Informal Test – a non-standardized test that is designed to give an approximate index of an individual's level of ability or learning style; often teacher-constructed.

Inventory – a catalog or list for assessing the absence or presence of certain attitudes, interests, behaviors, or other items regarded as relevant to a given purpose.

Item – an individual question or exercise in a text or evaluative instrument.

Norm – performance standards that is established by a reference group and that describes average or typical performance.

Normal Curve Equivalent – standard scores with a mean of 50 and a standard deviation of approximately 21.

[5]The ERIC Clearinghouse on Assessment and Evaluation, A Glossary of Measurement Terms. ERIC Document Reproduction Service No. ED3154430, Aug 1989.

Norm-Referenced Test – an objective test that is standardized on a group of individuals whose performance is evaluated in relation to the performance of others; contrasted with criterion-referenced test.

Percentile – the percent of people in the norming sample whose scores were below a given score.

Percent Score – the percent of items that are answered correctly.

Performance Test – designed to evaluate general intelligence or aptitudes. Consists primarily of motor items or perceptual items because verbal abilities play a minimal role.

Published Test – a test that is publicly available because it has been copyrighted and published commercially.

Rating Scales – subjective assessments made on predetermined criteria in the form of a scale. Rating scales include numerical scales or descriptive scales. Forced choice rating scales require that the rater determine whether an individual demonstrates more of one trait than another

Raw Score – the number of items that are answered correctly.

Reliability – the extent of which a test is dependable, stable, and consistent when administered to the same individuals on different occasions. Technically, this is a statistical term that defines the extent of which errors of measurement are absent from a measurement instrument.

Screening – a fast, efficient measurement for a large population to identify individuals who may deviate in a specific area, such as the incidence of maladjustment or readiness for academic work.

Standardized Test – a form of measurement that has been normed against a specific population. Standardization is obtained by administering the test to a given population and then calculating means, standard deviations, standardized scores, and percentiles. Equivalent scores are then produced for comparisons of an individual score to the norm group's performance.

Standard Scores – a score that is expressed as a deviation from a population mean.

Validity – the extent to which a test measures what it was intended to measure. Validity indicates the degree of accuracy of either predictions or inferences based upon a test score.

Notes

Step 7: Know Your Results

"If there is one point at which most program developers fall short, it is I determining the value of a program."

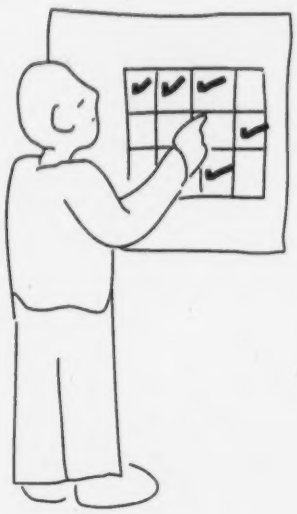
— Sticht & Mikulecky, 1984, p. 36

"One of the most important questions is whether adult literacy training is effective...the literature in this area is incomplete or inconclusive."

—Tenopyr, 1984, p. 13

Evaluation

One of the most important aspects of adult education at work is evaluation, knowing the results of a program. "Know Your Progress" focused on what researchers term "formative evaluation." Formative evaluation is measurement and communication that helps to form the program, to improve the effectiveness of learning. "Know Your Results" focuses on what researchers term "summative evaluation," knowing the overall results and effects of the learning program after it is completed. Workplace programs are evaluated in a variety of ways. In some cases, the instructor is the evaluator, in others it is the ABE Supervisor. An effective Workplace Education Team might help conduct a final evaluation.



Program evaluation determines the value of the learning program. Program evaluation has four purposes. These are to provide the following:

- Information for making decisions
- Feedback to employers
- Useful information for planning future programs
- Feedback to the Adult Education Program

Evaluation—Who? What? How?

As with the process of program improvement, effective evaluation is built on a foundation of measurement and communication. Evaluation involves four stakeholder groups:

- The participant
- The instructor
- The class or adult learning program itself
- The workplace

Step 7: Know Your Results

Evaluation makes use of **four kinds of data or information**:

Reaction: How well did program participants like the program?

Learning: What knowledge did participants gain from the program? What principles, facts, information, techniques did they learn?

Behavior: What changed in the behavior of the participants in their work settings as a result of the learning program?

Results: What were the results of the learning program in the workplace? Were there any reduced costs, improved quality of work, increase in production or change in turnover?

The kinds of evaluation information to be collected and the stakeholder groups involved are suggested in the following Program Evaluation Matrix:

FORM

Program Evaluation Matrix Form

PROGRAM STAKEHOLDERS

EVALUATION MEASURES	Participant	Instructor	Class	Workplace
Reaction				
Learning				
Behavior				
Results				

Outcomes or Process Measurement

There is an increasing trend in adult education assessment and evaluation toward the measurement of outcomes rather than educational processes. Outcomes can be written for each box in the program evaluation matrix above. Traditionally educators measured attendance, test scores and course completion. While these are still important indicators of a learning program's success and improvement, they are not outcomes for the organization. The outcome of a learning program is the result for the participant or organization. Few participants simply want to complete a GED (or PhD for that matter) simply to get the credential. Most want to see a change in their lives, a new job, increase in compensation or the achievement of a higher goal.

Within the Families First welfare reform initiative in Tennessee, for example, the outcomes include employment and economic self sufficiency. In order to get a job a participant may need to successfully complete a GED, but that credential is not the primary outcome for Families First. Process measurements such as attendance, participation, lesson grades or even course grades are

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important as indicators and should be utilized, but the identification and achievement of program outcomes is also critical. Outcomes impact the bigger picture of life for the individual and the organization.

The program plan, developed in "Know Your Plan" and agreed to by all stakeholders in the letter of agreement, has an evaluation component in it. Ideally, if the plan has been carefully developed, the goals and outcomes for the program are clear and evaluation is much easier. If you know your plan, these are the evaluation questions:

- To what extent was the plan accomplished?
- What were the barriers encountered in accomplishing the plan?
- What was learned along the way?
- What results were achieved.

In developing adult education at work, it is important to first identify the desired outcomes. Usually there are more than one, but rarely more than a few. Assessment then involves the identifications of the learning needs of the participant in relation to the desired outcome for the learning program. If the learners says, "I want to get a better job," and enrolls in a GED class, the short term outcome is a GED, but the longer term outcome is a better job. Therefore, when the long term outcome is employment the instructional materials and methods may be quite different than if the long term outcome is a GED. If employment is the outcome then an instructor might utilize all kinds of materials having to do with the employment process. This would equip the participant with basic skills and work skills, thus helping to ensure a better outcome for the participant.

There are many possible kinds of program measurements that could be used in evaluation. Among them are measurements for program process and program outcomes:

Process measures are:

- Numbers of participants completing program
- Degree of participant satisfaction with program
- Satisfaction of management with program results
- Supervisors and managers perceptions of participant's effective skill levels before during and after program
- Union representative's perception of participant's skill levels before, during and after program

Short term outcomes measures are:

- Percentage of participants that go on to further training
- Levels of skills and competencies achieved during program
- Achievement of credentials such as GED

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- Percentage of participants achieving desired outcomes as a result of program

Long term outcome are:

- Measurement accuracy has increased in the plant and the cutting process has improved
- Absenteeism has decreased
- Quality measures are up

Information Gathering

Once the stakeholders, the kinds of evaluation measures, and the desired outcomes are identified, collection of information begins. At the end of the program, much of the evaluation data already exists and is contained in the participants confidential folders, in the periodic reports to management, and in the records kept by the instructor. Different kinds of data can be used for evaluation.

- **Survey.** Surveys utilize specific or open ended questions that are answered by participants. Surveys are useful when large numbers of people need to be sampled using specific questions. Surveying is a time and cost effective technique for data gathering.
- **Interview.** Interviews are conducted with individuals and involve oral questions and answers. The interviewer asks specific questions and notes the respondent's answers. Often interviews are tape recorded.
- **Focus Group.** A focus group is a group interview involving oral questions and answers. The interviewer asks a series of questions to the group and notes the answers of the participants. Focus groups also are tape recorded.
- **Pre- and post-test assessments.** These involve a written assessment administered to participants before and after the learning program to measure learning gains.
- **Written participant reflection** is an open-ended reflection where the participants write about what they learned in the course and the applications of the course experience to their lives.
- **Observation and documentation** is the process of observing behaviors and activities in a particular setting and noting similarities and differences.

The evaluator always has some choice in determining the methods used in evaluation. Available time, cost, purpose of evaluation and deadlines for reporting all can impact the choice of evaluation methods. Many adult educators prefer to use more than one kind of data gathering method. Data gathered from different individuals or groups, using different methods increases the validity and reliability of evaluation results. Whatever the form used, the process of data collection should involve careful observation and accurate measurement and recording of data.

The following is the same Program Evaluation Matrix utilized above, but with possible evaluation methodologies suggested for each evaluation measure and stakeholder group.

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RESOURCE

Program Evaluation Matrix

PROGRAM STAKEHOLDERS

	Participant	Instructor	Class	Workplace
Reaction	Individual "exit" survey self measure; Focus group; Interview	Written evaluation of instructor by participants	Survey of class reaction as a unit; Focus group of class participants	Perceived quality of work life, observation
Learning	Pre- and post-skills assessment test	Written self assessment by instructor	Aggregate measure of learning gains of all class participants	Measurement of number of all employees with GED or specific skill level
Behavior	Observation by supervisor or employees & feedback to participant	Observation of instruction by third party; written reflection	Observation of class by third party; written reflection	Observations of employees by supervisor & manager; written reflection; Measurement of behavior indicators
Results	Measurement of individual job performance such as units produced or quality measures	Aggregate scores of class participants over multiple classes	Class attendance, participation, attitudes measurement of classes outcomes achieved	Organizational results measured by changes in workplace indicators (production absenteeism)

The assessment of learning gains is often accomplished through a pre- and post-test, that is, a test of the participant's skill level before the learning experience and a test following the learning experience. Pre and post testing focuses on the skill to be learned. If the goal is to read a manual, the pretest would involve a measurement of the participant's ability to read the manual and the post-test would involve a test of the participant's ability to read the manual following the completion of the learning program. Some learning programs come with a suggested format and test for measuring skill levels. The assessment instruments mentioned in "Know Your Progress" can be utilized in a pre- and post-test format.

One of the most common evaluation measures used in adult education programs is the post course evaluation survey. These can be constructed in different ways. Many adult educators have found that successful surveys of program

Step 7: Know Your Results

participants are short (usually one page), simple and focused. Often a combination of numerical ratings and open ended questions are used. The use of numerical rating questions allows the evaluator to compile numerical data for the whole class. The open-ended questions provide information about the participant's different experiences in the course. The following is an example of a participant post-course evaluation form:

FORM

Post Course Evaluation Form

Post Course Evaluation for Participants

1. Rate your overall satisfaction with this course on a scale of 1 to 5 with one being low and 5 high.

Low satisfaction ◄——————————► High satisfaction

1 2 3 4 5

2. What did you learn from this course: _____

_____

3. One thing that was most helpful in the course _____

_____

4. One thing you would like to see changed: _____

5. What will be different in your work as a result of having taken this course? _____

_____

6. Rate the following:

	No	Probably not	Maybe	Yes	For Sure
This course will help me get ahead in this company.					
This course will help me do my job better.					
I learned new things that are important for my work.					
I will take other courses					
This course was a positive experience for me					

Comments: _____

_____

The following is a course evaluation form from the Maury County adult education program. Note that the surveys look at the perspective of both the program participant and the supervisor.

RESOURCE

BEST Program Satisfaction Survey: *Employee*

Employer: _____

Date: _____

Pre GED: _____ GED: _____

Please circle the number that best represents your opinion. Your name will not be used on any reports so please answer as truthfully as possible. Thank you.

Unhappy	Unhappy	Neither Happy nor Unhappy	It Was O.K.	Very Happy
1	2	3	4	5

How satisfied were you with:

1. The English / Reading teacher / tutor?	1	2	3	4	5
2. The Math teacher?	1	2	3	4	5
3. The encouragement of supervisors and plant managers	1	2	3	4	5
4. The times courses were offered?	1	2	3	4	5
5. Location of classrooms?	1	2	3	4	5
6. The hours per class?	1	2	3	4	5
7. The number of weeks in a program?	1	2	3	4	5
8. Changes in yourself due to participation in this program?	1	2	3	4	5

9. Would you encourage co-workers to participate in the program? Why or why not? Yes ___ No ___

10. My feeling about myself as a result of this program.

11. One thing I wanted and received from this program.

12. Something I didn't expect that happened (either good or bad) as a result of this program.

13. Do you feel the program has helped you to do your job better? (Yes or No and please describe.)

14. Has the material (class work, assignments) been:

TOO EASY ___ ABOUT RIGHT ___ TOO DIFFICULT ___

RESOURCE

BEST Program Satisfaction Survey: *Supervisor*

Employee's Name: _____

Supervisor's Name: _____

We are interested in your reactions to your employees participation in the BEST literacy program. For each question below circle the number that best represents your opinion Your answers will only be used far evaluative reasons and your name will not be used on any reports so please answer the question as accurately as possible

Not at all Beneficial	Slightly Beneficial	Somewhat beneficial	Very beneficial
1	2	3	4

Has this program been beneficial in improving this employee's: (NA = not applicable or unable to judge)

1.	Work skills?	1	2	3	4	NA
2.	Productivity?	1	2	3	4	NA
3.	Ability to work with less supervision?	1	2	3	4	NA
4.	Literacy level?	1	2	3	4	NA
5.	Level of motivation?	1	2	3	4	NA
6.	Absenteeism?	1	2	3	4	NA
7.	adherence to safety rules?	1	2	3	4	NA

Overall, how satisfied are you with changes in this employee due to their participation in the program.

Not Satisfied at All				Very Satisfied	
1	2	3	4	5	NA

Data Analysis

After measurement has taken place and the information has been collected, it must be analyzed and interpreted. The first step is to group the data. Often evaluators will sum or add like variables, figure percentages or compute averages as a simple way to analyze numerical data. Grouping data can also be done by sorting, as in the case of answers to open ended questions. For example, if the answers to question 4 above, "What would you like to see changed?"

were to be sorted, that process would involve putting all the similar answers "in the same pile" to determine if they have any relationship. In research terminology this process is called coding.

In our example, after sorting the answers to question four for a class of 30, twelve said they hated the refreshments and that is what they would change, while three said the room was too hot, five said the class was boring, four wanted to use a different book and six had no opinion. In this example, the fact that 40% identified the refreshment as an item to change is significant, especially since the next highest variable was 16% (class was boring) and 20% had no opinion.

Analysis involves looking for relationships between data. For example how the reading assessment scores for a participant are similar and different when measured before the learning program and after. If Joan's initial score was a 70 out of 100, for example, and her score at the conclusion of the course was 90, her 20% increase would be significant, especially if the instructor knew that the average increase for the previous 100 course participants was 7%. Many assessment measures come with suggestions for interpretation and significance that have been developed with great care and accuracy.

The question arises, how do you know if a difference is significant? While it is not always easy, sometimes it is obvious. Sometimes the evaluator can compare two different kinds of data, such as what the participants in two focus groups said about the refreshments as well as the participant survey results. If a researcher is not sure of the significance the difference can still be reported. In an evaluation process not all findings are of equal significance.

Analyzing evaluation data is not a clear-cut scientific process. In evaluation it is often helpful to get the assistance of others who conduct evaluations. The faculty at a local community college or university can often answer questions or provide advice or insight.

Whatever the process of analysis, evaluation is the process of letting the measured data of the learning program tell their story. The report is the written document that assists in that process.

Evaluation Reports

Written evaluation reports differ depending on their audience and purpose. Obviously a report developed for an individual participant will be very different than one designed to present evaluation data to the board of directors of a company. Whatever the purpose and audience, effective evaluation reports share these common characteristics:

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- Are only as long as they need to be
- Describe the purpose and activities of the learning program
- Use measured data in drawing conclusions
- Are tied to the goals and outcomes of the program
- Measure the strengths and weaknesses of the program
- Make recommendations based on the data collected.

Evaluations can be as short as one page or as long as fifteen pages. Regardless of the length, evaluation reports have the following components:

- Description of program (including purpose / plan, participants and methodology)
- Identification of the data that was gathered
- Analysis and interpretation of data
- Conclusion and recommendations

In evaluating adult education at work, generally evaluation reports will be prepared for the following groups:

- Employers
- Union representatives
- Adult education program staff for marketing or future program planning
- Reports to the oversight body for the adult education program that conducted the course (Board of Directors or State Agency)

In writing evaluation reports the same guidelines for confidentiality apply as were described in "Step 5 - Know Your Progress."

Problems in Evaluation

Sometimes in evaluating a learning program it is difficult to know how to evaluate the program. Questions such as: *Against what measure should the program be evaluated? Is there an ideal norm? What criteria should be used? Did the goals change?* Often employers and educators will have different criteria for success. Difficulties involved in data collection—insufficient time, resources and personnel can also complicate the evaluation process. Sometimes stakeholders will fail to use the data collected or misuse the information for their own purposes.

Another challenge is in the process of comparison. The old adage is true, you have to compare apples with apples.

In order to "sell" employers on basic skills programs for their employees, there is a tendency to want to promise outcomes that are difficult to measure. For example, a basic skills program might claim that a result in their program will be a reduction in scrap. The most important factor is how that reduction in

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scrap will be measured, by whom, and when. There are many variables that can impact reduction in scrap besides basic skill levels of employees. Be cautious when asserting that an educational program directly affects a broad workplace outcome such as the amount of scrap.

Lessons Learned

Whatever the forms of evaluation that are used in adult education at work programs, it is often very useful to gather the primary stakeholder group for a "Lessons Learned Session." If the program has a Workforce Education Team, this is an excellent piece of work for that group. This informal process allows for the stakeholder group to identify the things that were learned as a result of the experience of conducting the learning program. It is especially useful to involve representatives from the different stakeholder groups. Because perspectives differ, the lessons learned will differ for each participant. Identifying those differing perspectives can be very useful in the process of evaluation and continuous improvement.

ACTIVITY

In conducting a Lessons Learned Session, the following steps have been found useful:

- Make sure there is an informal atmosphere, an informal room, enough time for participants to reflect, a sense that the process is open (the answers are not pre-determined).
- Use one or more flip charts (depending on the size of the group, it may be important to have two).
- As in a brainstorming session do not try to edit the responses, except for clarity. The idea is to get as much participant response as possible.
- Write the responses on the flip chart and post on the wall.
- When participants finish listing their lessons learned, go over the list and try to consolidate and clarify the responses as a group.
- Sometimes it is useful for the group to decide which of the lessons learned are the most important. One method for making that decision is to give each participant a number of self-adhesive, colored "dots" equal to about 25% of the total number on the list and ask them to "vote" — stick their dots on the paper next to the items they feel are most important. For example, they could vote for one item using all their dots, or several items with a single dot, depending on how they felt.
- Ask the group if the results of the voting does in fact reflect the sense of the group. In almost every case it does.
- When this activity is completed, the list of items will be the "lessons learned" by the program stakeholders, in priority. These lessons learned are very useful for evaluation, program improvement and future program planning.

Step 7: Know Your Results

Conclusion

Even though it might seem that the learning program is completed when the evaluation has been finished and delivered to the various stakeholders involved, that isn't really true. The completed program will continue to impact the practice and thinking of the adult educator long after the program is finished. The process of developing, implementing and evaluating an adult education program in a work setting impacts the individuals and organizations that were involved in the learning program. Sometimes this impact is subtle; sometimes more dramatic. There are cases where one program has changed the direction of a participant or organization. In any case, at the conclusion of any learning experience, the question arises for the participant, the workplace and the adult educator, what next? That is the subject of the concluding chapter of *Adult Education at Work*.

Notes

Conclusion

> *Learning is the new form of labor. [It's] no longer a separate activity that occurs either before one enters the workplace or in remote classroom settings.... Learning is the heart of productive activity.*
>
> —Shoshana Zuboff
> *In the Age of the Smart Machine*

Adult Education at Work

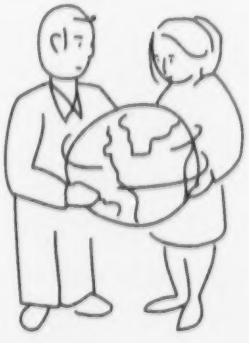
Adult Education at Work involves seven key steps. Each one has been examined in a chapter of this Handbook. The theme of each step is an integral part of successful adult education at work.

Step 1: Know Your Program focuses on your own adult education program. The uniqueness of your adult education program is the foundation on which everything else is developed. This goal of this step is to develop a mission statement and program fact sheet.

Step 2: Know Your Community examines the uniqueness of the local community, its employers and learning needs. The goal of this step is to develop a marketing plan for your adult education program.

Step 3: Know Your Workplace focuses on understanding the workplace, its culture, employees, and learning needs. Step three also identifies stakeholders and possibilities for program collaboration. The goal of this step is a set of written program goals based on identifiable workplace needs.

Step 4: Know Your Resources involves the identification of the human and other resources necessary to develop a plan to achieve the goals of adult education at work. The goal of this step is a list of resources for the workplace program.



Step 5: Know Your Plan involves the development of a plan for an adult education program at work. It specifies what the learning program will be, who is involved, and how and when it will be conducted. The goal of this is a written letter of agreement with the employer that summarizes the program plan.

Conclusion

Step 6: Know Your Progress focuses on measurement, assessment, communication and program management. The goal of this step is a plan for periodic reporting.

Step 7: Know Your Results focuses on determining the results of the workplace program. It examines evaluation and reporting. The goal of this step is an evaluation and a final report on the learning program.

The concluding chapter of *Adult Education at Work* is a chapter that looks toward the future. It focuses on the challenges and opportunities of doing adult education at work today.

Six Challenges for Adult Education at Work

- **Integrate Adult Education into Workforce Development**
  Workforce Development is the process of bringing together the resources of citizens, educators and employers to improve citizens' quality of life. A key assumption is that as a person's skills increase, they will have more opportunities for advancement which will lead to work that is more challenging and higher paying. It is also assumed that a more highly skilled workforce will lead to greater workplace effectiveness and profitably, which will lead to more employment opportunities. These assumptions themselves are open to question, but the vast majority of educators and employers believe that education is a benefit for both the employee and the employer. Workforce development involves many different stakeholders. Adult basic education is a key stakeholder, especially in communities where significant numbers of employed citizens do not have a GED or high school diploma. A critical challenge for adult education is to position itself strategically for effective involvement in emerging workforce development efforts.

- **Teach Work-Related Basic Skills**
  The SCANS Report has underscored fundamental changes in the adult basic skills required for success in today's world. The report highlights a broad understanding from the traditional concept of reading, writing and arithmetic to include such things as listening, speaking, decision making, planning, problem solving, team skills and even basic computer skills.[1] The role of adult education is expanding—challenging adult educators to strengthen their capabilities as teachers and program developers.

[1] What Work Requires of Schools: A SCANS Report for America 2000, U.S. Department of Labor, June 1991.

Conclusion

Tennessee employers are also suggesting a broader definition of adult basic skills. In a major study completed in 1996 for the Tennessee Department of Human Services involving over 2500 employers, respondents identified key areas of knowledge, skills and attitudes (KSA's) essential for successful employment.[2] These KSA's were developed from the SCANS Report and field tested over three years by employers and adult educators.

The results were both confirming and surprising. Almost half of the employers surveyed underscored the importance of the GED or High School Diploma for successful employment (46%). The same group also highlighted a number of basic work skills, such as dependability (91%), following instructions (76%), accurately performing work operations (67%), working on a team (57%). A number of personal skills were also emphasized, such as listening (51%), respect (45%), cooperation (53%), getting along with others (64%), and doing the right thing, work ethics (57%). Although there is a slight variation in the definition of the words describing some of the skills and the definition of the essential skills is not absolutely uniform in every community, the overall picture is very similar. Employers today are especially emphasizing the importance of two clusters of skill areas:[3]

— **Work related skills**, such as dependability, following instructions, accurately performing and doing the right thing (work ethics)
— **Interpersonal skills and attitudes**, such as getting along with others, team work, cooperation, listening and talking respectfully.

The challenge for adult educators is to adequately address basic skills education in its broad definition, to address the whole person in the context of a changing world of work and life.

Perhaps the greatest of all pedagogical fallacies is the notion that a person learns only the particular thing he is studying at the time. Collateral learning in the way of formation of enduring attitudes, of likes and dislikes, may be and often is much more important than the spelling lesson or the history that is learned. For these attitudes are fundamentally what count in the future. The most important attitude that can be formed is that of desire to go on learning.

—John Dewey
Experience and Education,
1938

- **Use the Work Context for Learning**
  When a person is near-sighted, all they can see is what is right in front of them. When a person is far-sighted all they can see is what is at a distance. In adult education at work there is a danger in focusing on the immediate need or focusing only on the broad general approach without finding a balance between them.

[2] Dent C. Davis, Entry Level Job Survey Report: Statewide Sample, Tennessee Department of Human Services, Nashville, TN., 1996.
[3] A follow up study in 1997, carried out by Dent Davis for the Department of Human Services, basically confirmed the previous results and identified these broad skill areas.

Conclusion

"Adult education calls for a new kind of textbook as well as a new type of teacher. Under conventional educational systems both teacher and text attempted to make situations fit subjects, whereas the demand is for subjects to serve situations."

— E. Lindeman
The Meaning of Adult Education, 1926

Traditionally the emphasis in education has been on the learner and the educational process. Today there is also an emphasis on the context for learning. Research has shown that significant behavior changes are more likely to occur when learners are engaged in experiential learning addressing real life issues in a supportive group of peers and instructors. This has various implications for the practice of adult education at work. One study suggests the need to "Create holistic, integrated curricula that blend basic skills development with occupational preparation and personal growth" (Susan Imel, *ERIC Practice Application Brief*, "Welfare to Work: The Role of Adult basic and Literacy Education," 1995). The functional context approach to adult education attempts to focus on the context of work. An example would be teaching a machine operator how to do the math required to run a particular machine. The problem is that the functional or immediate context of work is often too small, and is changing too rapidly. As soon as an employee learns how to operate a machine, the company gets a new machine or the worker is moved to a new shift.

The context of work today is greater than the immediate job, yet the immediate job is critical. This Handbook is based on the assumption that in today's world it is necessary to focus not only on the individual and the immediate skills need for a specific job. It is also necessary to focus on the context of the workplace as a whole. If the employee can master the skills necessary for success in the XYZ company, he or she will be valuable not only in the specific job they are now doing, but also in other jobs at the XYZ company, as well as other companies and communities. The challenge for adult educators is to develop creative methods and classes that will address adult basic skills in the context of work without being tied too specifically to a particular job. Learning programs need to be customized to the context of work.

"Provide customized services responsive to employer and employee needs"

Ten Principles for Effective Workforce Development Programs, Issue Brief, National Governor's Association, Washington, D. C., 1997.

As the adult educator is able to develop a learning program that will address the need of the employer and the employee, the program will be relevant and successful. It will enjoy both employee involvement and employer support. Many adult educators in Tennessee have been customizing learning programs to meet the needs of participants and employers for a long time. It is a challenge to manage an effective long term class or program and at the same time customize it to fit multiple needs. Yet this is exactly what needs to be done.

- **Integrate Technology into Workplace Learning**

  The use of information technology offers a unique opportunity to customize adult education programs for the workplace. Technology allows for the delivery of quality learning programs and exercises on an as-needed basis. Technology also supports the assessment and measurement of results

in an efficient manner. The use of the Internet for education is also growing at a rapid rate. In the near future there will be more and more resources, learning programs and other applications available by way of the Internet.

The use of technology can be a powerful way to strengthen adult learning. This is especially true when technology resources are combined with a group or class setting and an instructor. Many adult learners are inexperienced in the use of technology and technology itself can be a barrier. Often it is difficult to learn new technology, especially in the beginning stages. Applications are often expensive. Technology is changing so rapidly that it is easy for it to be out of date soon after purchase. The challenge for adult educators is three fold: to help adult learners become comfortable and skilled in the use of information technology, to develop and use up-to-date education technology resources, and to develop an effective strategy for using information technology that will maximize the effectiveness of adult learning.

- **Build Respectful Relationships**
  Respect is one of the hallmarks of adult learning. Adult educators in Tennessee are known for their focus on and support of the adult learner. Relationships matter. Relationships are also important at workplaces. Companies spend considerable resources strengthening and improving the relationships between their employees. Yet all too often in the high pressure environment of work, respect can become less important than compliance. Sometimes this high pressure atmosphere of compliance and diminishing respect can spill over into the educational experience itself. The challenge for adult educators is to continue to use the strong relational bias of adult basic education in Tennessee in the development of adult education at work while maximizing program outcomes.

- **Be Collaborative and Build Partnerships**
  Traditional education identified team work and collaboration as "cheating." Collaboration is now seen as an essential skill in the workplace, however, most people have very little experience teaching or learning the skills of collaboration. Historically, teachers did not collaborate in teaching their class. Yet the reluctance to cooperate or collaborate - learned all too well over the years - affects the program of adult education at work. Some people say that collaboration is sometimes self-defeating when one party is overly competitive. The challenge for adult educators today is to identify collaborative partners who share similar values and goals, and then develop effective reciprocal partnerships.

Conclusion

"Because they use traditional pedagogical approaches for which many adults have little tolerance, adult basic and literacy education programs have experienced difficulty attracting and retaining participants"

Susan Imel
ERIC Practice Application Brief, "Welfare to Work: The Role of Adult basic and Literacy Education," 1995).

☛ TIP

"Develop collaborative relationships with other agencies"
Susan Imel,
ERIC Practice Application Brief, *"Welfare to Work: The Role of Adult Basic and Literacy Education," 1995).*

Conclusion

☛ TIP

"We must be very careful not to just take what we do in ABE to the workplace, for in the workplace we are working with a different set of needs and with people who relate to life from a different paradigm from the traditional ABE student. We must be prepared to address needs beyond the normal ABE scope. "
Heather Nicely,
Kingsport, Tennessee

Adult Education at Work Is a Work in Process

The conclusion of an adult education learning program is a time for documentation and celebration of the results accomplished. In any program there are accomplishments, as well as lessons learned. Every experience of adult education at work has consequences for participants, educators and employers. Some consequences are planned and others are unintended. Because the work is rapidly changing, there will be an ongoing need for adult education at work. And because of these changes in work, adult education at work will also change.

The adult educators of the State of Tennessee actually wrote this Handbook as they contributed their reflections and ideas on adult education at work. This Handbook documents their work. The Handbook also expands on their ideas. Not every suggestion will be useful in a specific worksite. Many additional items continue to be identified as educators do adult education at work. As adult educators, we continue to learn.

> *Indeed, if adult education is to produce a difference of quality in the use of intelligence, its promoters will do well to devote their major concern to method and not content.*
>
> —E. Lindeman,
> *The Meaning of Adult Education*, 1926